CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

APRIL 9, 1990

C2965 1 8

N HA! CUT IT?

MIXED REVIEWS ON CABLE EEO

HDTV

Are you ready for 1993?

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CONGRESSTIONAL INFO SR, SR ###
EDITOR/ACQUISITIONS ###
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BETHESDA MD 20814

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT APRIL 9, 1990

FEATURES

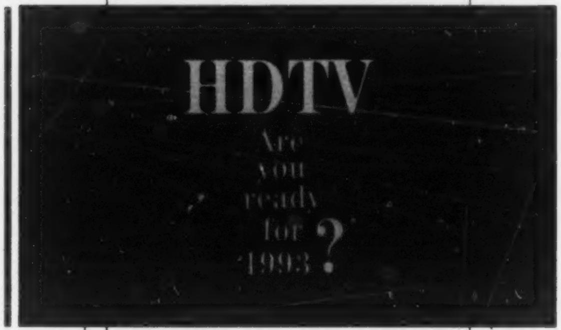
PROGRAMMING 24
HA! launched just days ago with what many observers believe is a better shot at winning TV's comedy race than HBO's Comedy Channel

MARKETING 34
Network promotional campaigns grow bolder, simpler in their effort to grab viewer interest

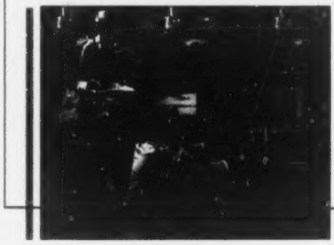
TECHNOLOGY 47
Operators experiment with moving the consumer interface off the set and on to the side of a house or atop a utility pole

POLICY 56
A blueprint for reregulation is circulating in Washington as Congress and the FCC move toward action on cable

COVER STORY



HDTV's New Ballgame . . .40
The FCC's decision to zero in on simulcasting sounds the starting gun for operators to prepare for 21st century TV



HANDBOOK

EEO Tremors 51
A soon-to-be-released report will find more than 100 operators in violation of government rules

Drug Testing 52
Operator liability for installers' criminal behavior has convinced some to test for substance abuse before hiring

DEPARTMENTS

BETWEEN THE LINES . . .8
Behind the LBS/Nostalgia deal; insurance costs for satellite launches likely to skyrocket after blowups; following NBC/Cablevision's Olympics pay-per-view venture; and MPAA watches a fire it set in cable reregulation

FORUM 22
Attorney John Cole Jr. meditates on the value of small pleasures: a night on the town, a cable subscription

CHANNEL HOPPING 32
Night by night, here's what the networks are serving up during National Cable Month

MONEY 62
Stock market moves and a rundown of recent acquisitions and transactions in cable

CABLE POLL 70
Ninety-four percent of cable systems have developed plans to comply with FCC's new CLI rules; 95 percent own testing equipment

PARTING WORDS 74
Three industry conventions occupy the same two-week period in September, and exhibitors are not happy

Diversified Publishing Group, 1990. A division of Capital Cities Media Inc. All rights reserved. *CableVision* (USPS 547-410) (ISSN 0361-8374) is published biweekly by Diversified Publishing Group, 600 S. Cherry Street, Suite Denver, Colorado 80222 or P.O. Box 22955, Wellshire Station, Denver, CO 80222. April 9, 1990. Volume 14, Number 21. Subscription price: 1 year, $55.00; 2 years, $98.00. Outside USA 1 yr.-$124; 2 yr.-$205; 3 yr.-$274. PREPAYMENT IN U.S. FUNDS ONLY! Second class postage paid at Denver, Colorado and additional mailing offices. POSTMASTER: Please send address changes to: *CableVision*, 600 S. Cherry St., Suite 400, Denver, Colorado 80222.

ABP BPA

The CABLE POLL DATABASE

™Midwest CATV • CED • CableVision

Cable operators implementing CLI compliance programs before July 1 FCC rules kick in

By Larry Jaffee

Despite a Federal Communications Commission official's forecast at the last Atlantic Cable Show that the agency expected about 60 percent of the country's cable systems to fail the agency's new cumulative leakage index rules, 76 percent of the respondents to The Cable Poll™ survey last August said they would pass the test.

In the latest survey commissioned by Midwest CATV and *CableVision* magazine conducted in February, 94 percent of the 396 reporting systems said they have developed a plan to correct leaks, and 95 percent said they presently own equipment to test signals to insure CLI compliance on an ongoing basis.

Fifty percent said they completed work on correcting leaks. That's interesting, considering that when the survey was last taken in August 1989, 81 percent said they completed work on correcting leaks, signifying that the cable industry has been well aware of the need to be prepared for the forthcoming CLI rules.

Number

2

in a series of eight

However, 67 percent of the respondents in the latest poll believed that the FCC did not have the authority to permanently take away a cable system's right to cablecast some channels. In fact, 6 percent said the FCC couldn't levy monetary fines for non-compliance, while 16 percent said the FCC couldn't temporarily remove some channels.

"That's their opinion," responds John Wong, assistant chief of the FCC's cable branch. Apparently, those respondents weren't aware of the FCC ordering Paragon Cable of Graham, Texas to close down an unprecedented three mid-band channels and pay a $4,000 fine last November.

Wong can't estimate how many systems would fail today because the FCC's internal statistical reports won't be available before July or August. However, Wong senses that many operators "have gotten into high gear" since October. "A lot of funds are being allocated to the issue. But I still believe a certain number still have a problem."

According to the Cable Poll™, the size of system doesn't figure heavily in whether operators are making investments to insure CLI compliance, since 92 percent of the respondents with less than 10,000 subscribers and 94 percent with more than 50,000 subs said they own equipment to test signals on an ongoing basis.

But the size of MSO apparently does make a difference. Ninety-nine percent of both the MSOs in the top 25, and those that rank from 26-100, reported that they own the CLI equipment. However, once past the top 100 into mom-and-pop cable land, those operators with the equipment dips to 85 percent.

Also showing that the cable industry is getting ready for the rules is that percentage of systems that commissioned an aerial flyover or ground survey jumped from 61 percent in August 1989 to 72 percent in Feburary 1990.

Wong says the key for operators is continuous monitoring. "Systems can't be fixed overnight. Even though you fix a leak, a new bunch can crop up the next day. It could be squirrel season," he sums up. ■

Adding up your answers:

Do you think that the FCC will PERMANENTLY remove your right to cablecast some channels?

		# Subscribers		
	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
% Yes	20	19	20	28
% No	67	67	71	59
% Don't know	14	15	9	13

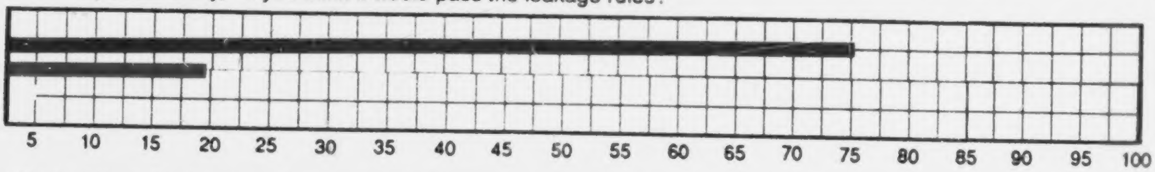
Does your system presently own equipment to test signals to insure compliance with the cumulative leakage index rules on an on-going basis?

		# Subscribers		
	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
% Yes	95	92	99	94
% No	5	8	1	0
% Don't know	1	0	0	6

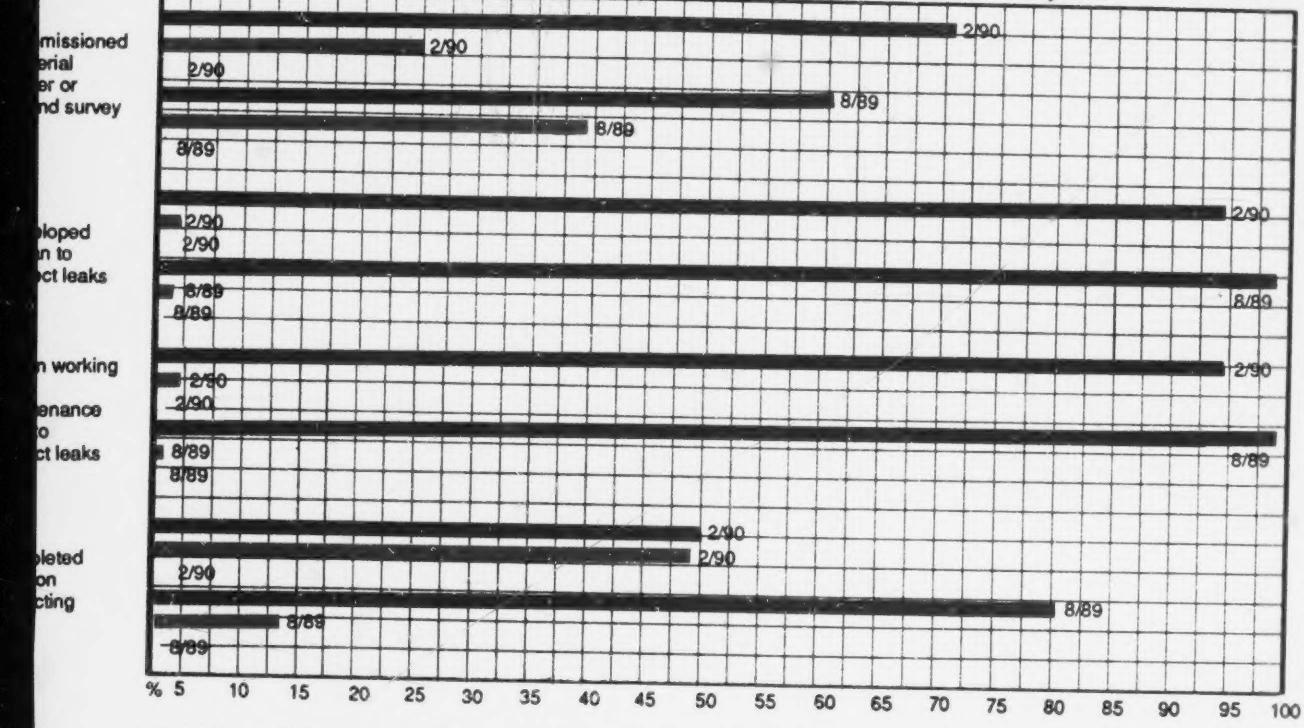
HOW THE POLL WAS CONDUCTED: The Cable Poll™ is conducted for Midwest CATV and *CableVision* magazine by Ryan/Samples Research Inc. Telephone interviews for this edition of the poll were conducted Feb. 1-15 with a random sample of 396 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points.

DATABASE

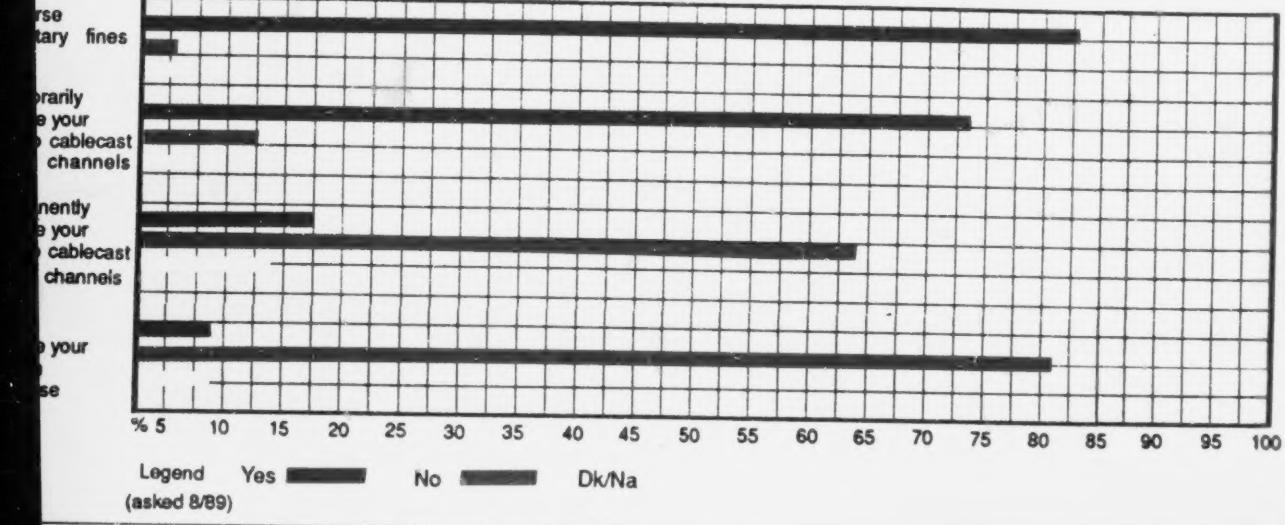
As you probably know, the FCC's cumulative leakage index rules take affect on July 1st of this year, if your system were inspected today, do you think it would pass the leakage rules?



Which of the following steps has your system taken to comply with the new CLI rules, have you ...



Which of the following do you believe are possible punishments that can be levied by the FCC for non-CLI compliance? Can the FCC...?



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DATABASE

Subscriber Count

Satellite national services

Basic services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	450	9,200,000
Alternate View Network	300	4,500,000
Arts & Entertainment Network (A&E)	4,900	43,000,000
Black Entertainment Television	2,150	25,500,000
CNBC	950	14,500,000
Cable News Network	12,590	54,400,000
Channel America	3	67,529
C-SPAN	3,764	48,100,000
C-SPAN II	738	20,100,000
The Comedy Channel	500	6,000,000
Country Music Television	1,791	10,300,000
The Discovery Channel	7,052	47,400,000
Eco/Galavision	300	1,000,000
ESPN	21,500*	55,340,000
Eternal Word Television Network	580	13,300,000
The Family Channel	8,659	47,297,000
Family Guide Network	60	4,500,000
FamilyNet	356	4,031,155
Financial News Network	3,550	32,700,000
FNN Sports	1,600	20,000,000
HA! TV (new)	N.A.	N.A.
Headline News	4,671	40,900,000
Home Shopping Network	1,488	16,928,895
Home Shopping Network II	384	6,796,525
The Inspirational Network	795	6,417,000
International Television Network	25	7,868,900
J.C. Penney TV Shopping Channel	150	6,100,000
KTVT	481	3,600,000
The Learning Channel	1,228	19,200,000
Lifetime	4,600	46,400,000
Mind Extension University	156	8,000,000
Mizlou Sports News Network	N.A.	5,000,000
MTV	6,015	49,700,000
Movietime	500	14,000,000
The Nashville Network	8,604	48,000,000
National College Television	194	5,600,000
Nick At Nite	3,725	46,500,000
Nickelodeon	7,100	48,500,000
The Nostalgia Channel	430	8,540,000
Prevue Guide	607	14,966,939
QVC Network	3,000	35,000,000
RFD TV	30	2,182,190
Silent Network	206	14,600,000
SportsChannel America	25	2,100,000
TBS Superstation	13,351	52,600,000
Telemundo***	8	110,000
TNT	4,700	40,000,000
The Travel Channel	511	14,000,000
Trinity Broadcasting Network	890	12,400,000
Univision***	500	509,500
USA Network	10,100	51,500,000
VH-1	3,000	34,600,000
Vision Interfaith Satellite Network	402	7,500,000
The Weather Channel	4,200	43,043,000
WGN-TV	12,248	31,000,000
WWOR-TV	2,900	13,500,000
WPIX-TV	840	9,378,474
WSBK-TV	73	227,936

Bonus/basic services

Bonus/basic services	Affiliates	Subscribers
American Movie Classics	2,000	24,000,000
Bravo	400	4,000,000

Pay services

Pay services	Affiliates	Subscribers
Cinemax	3,650	6,600,000
The Disney Channel	6,100	5,003,000
Home Box Office	7,400	17,000,000
The Movie Channel	3,250	3,000,000
Showtime	6,000	7,300,000
Tuxxedo Network	26	20,000

Audio services

Audio services	Affiliates	Subscribers
AEI Lifestyle	142	2,578,838
AEI StarTracks Vocal Hits	26	854,390
C-SPAN Audio Network	8	548,100
C-SPAN Audio Network II	4	440,700
Cable Radio Network	62	2,300,000
Galatic Radio	165	4,300,000
KKGO Super Jazz	18	133,639
Moody Bible Institute	63	1,058,368
Satellite Radio Network	237	483,000
Tempo Sound	125	1,250,000
WFMT Chicago	170	1,259,804

Text services

Text services	Affiliates	Subscribers
AP News Cable	185	2,500,000
AP Business Plus	54	1,400,000
AP News Plus	75	2,100,000
Cable SportsTracker	40	1,175,870
EPG	127	4,446,737
EPG Jr.	366	379,570
Genesis Storytime	39	1,550,000
Reuters NewsView	127	2,437,000

Computer services

Computer services	Affiliates	Subscribers
DBC/MarketWatch	462	N.A.
Electric Toy Box (new)	600	N.A.
X*Press Executive	545	30,000
X*Press X*Change	545	N.A.

Cross-channel promotion services

Cross-channel promotion services	Affiliates	Subscribers
NuStar	351	10,097,742

Non satellite-fed national services

Basic services

Basic services	Affiliates	Subscribers
Cable Video Entertainment	650	16,000,000
Consumer Classified Ad Network	3	195,000
Fuji Network	3	12,000
Vector Consumer Shopping Guide	9	325,000

Pay services

Pay services	Affiliates	Subscribers
Nippon Golden Network	5	13,600

Interactive services

Basic services

Basic services	Affiliates	Subscribers
Video Jukebox Network	40	4,000,000

Regional services

Basic services

Basic services	Affiliates	Subscribers
Arizona Sports Programming Network	N.A.	210,000
Atlanta Interfaith	3	225,000
Bay Area Religious Channel	6	113,000
Cable TV Network of New Jersey	34	1,396,451
The Ecumenical Channel	9	170,000
Florida Tourism Channel (new)	20	754,000
KBL Entertainment Network	67	1,200,000
Life Newsvision	35	50,000
Madison Square Garden Network	168	3,475,000
Meadows Racing Network	14	600,000
News 12 Long Island	4	594,000
Midwest Sports Channel	90	275,000
Niagara Frontier Sports Network	13	800,000
Northwest Cable Sports Network	3	700,000
Pacific Sports Network	N.A.	1,000,000
Pennarama	28	750,000
Prime Cable	9	381,938
Prime Sports Network	108	675,000
Prime Sports Network (Northwest)	N.A.	1,300,000
Prime Sports Network (Utah)	26	273,000
Prime Ticket	163	3,800,000
SportsChannel (Chicago)	70	1,600,000
SportsChannel (Ohio)	11	610,000
SportsChannel (Philadelphia/new)	27	500,000
Sunshine Network	200	2,800,000

Pay services

Pay services	Affiliates	Subscribers
Home Sports Entertainment	250	1,700,000
Home Team Sports	180	1,500,000
New England Sports Network	171	317,201
Prism	87	427,000
Pro-Am Sports	200	500,000
SportsChannel (Florida)	54	950,000
SportsChannel (Los Angeles)	76	125,000
SportsChannel (New England)	164	1,200,000
SportsChannel (New York)	103	1,300,000

Note: Figures for affiliate/subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision, Cable Stats, 345 Park Avenue South, 9th Floor, New York, NY 10010.

N.A. denotes information not available. *Includes MMDS and SMATV systems. **Count represents standalone affiliates/subscribers; portions of SC America are carried on Home Team Sports and the SportsChannel family of regional services. ***Spanish-speaking households.

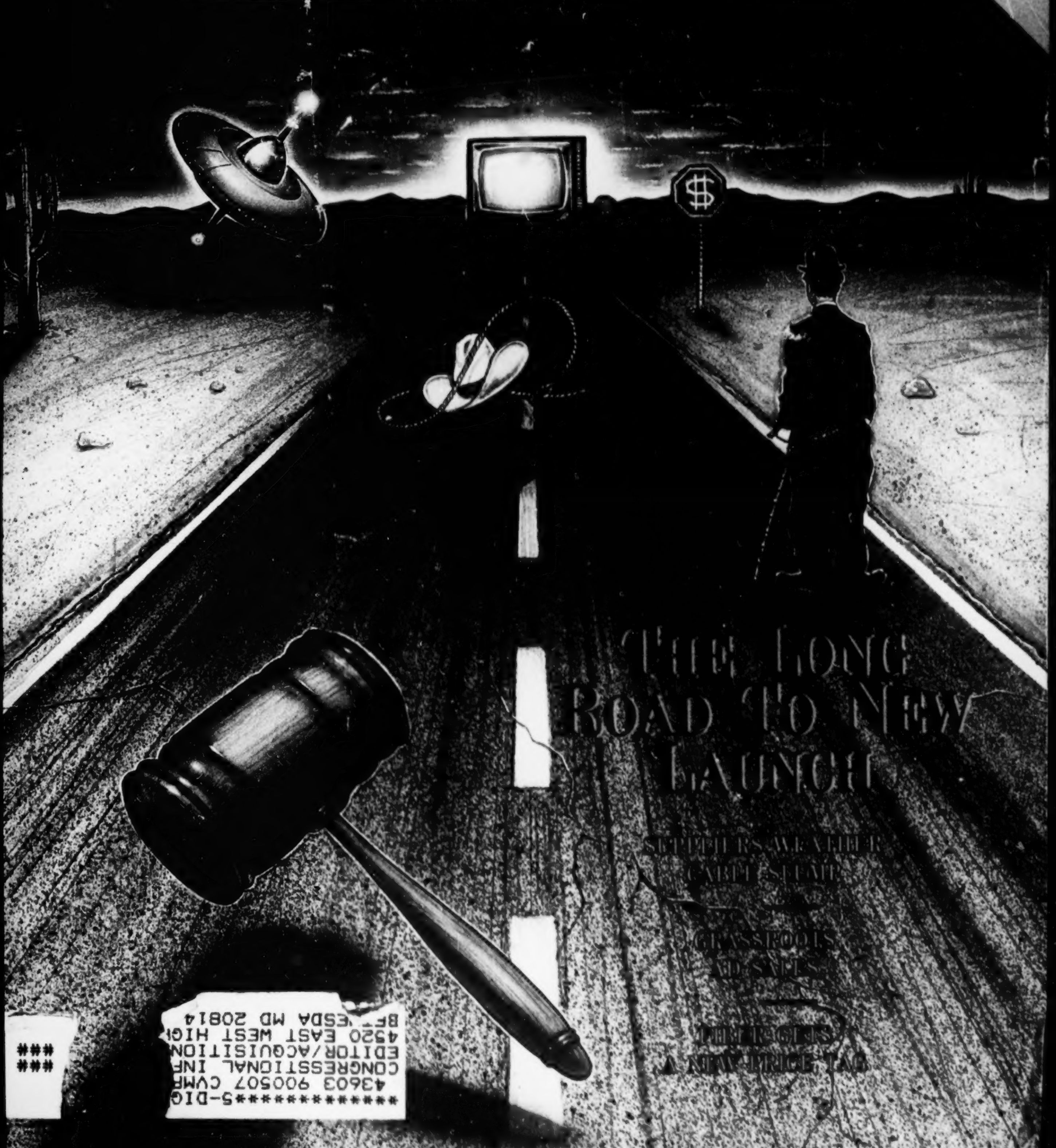
CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

APRIL 23, 1990

C2965-1

ANNUAL
AM NETWORK
GUIDE
Special Pull-out Section



THE LONG ROAD TO NEW LAUNCH

SUPPLIERS WEATHER CABLE SLUMP

GRASSROOTS AD SALES

FIBER GETS A NEW PRICE TAG

*************5-DIG
43603 900507 CVMP
CONGRESSTIONAL INF
EDITOR/ACQUISITION
4520 EAST WEST HIG
BETHESDA MD 20814

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INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT APRIL 23, 1990

FEATURES

TECHNOLOGY 28
Fully switched channel delivery could ultimately result from new breakthroughs in fiber architecture

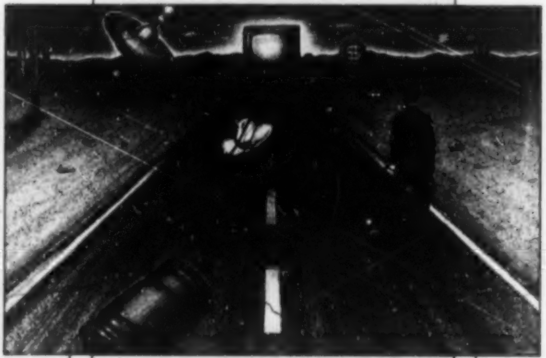
ADVERTISING 36
CAB, ARF conventions brought lots of talk about research to New York. *CableVision* senior editor Joe Terranova distills the best of it.

ADVERTISING 87
For a change, six award-winning local cable sellers shut up and let their customers do the talking

POLICY 96
NAB's bash in Atlanta brought cable and broadcasters together, but left telcos out in the cold

MONEY 106
Equipment supplier stocks aren't diving along with those of cable operators. Here's why

COVER STORY



COVER ILLUSTRATION BY BARNEY LAHAYE

Breaking the Logjam 18
The price of launching a new basic network has ballooned since the dial has grown crowded and fears of reregulation have snuffed out equity deals

HANDBOOK

Local Help for Cable Month 101
Contests and other events helped build awareness for cable's annual promotion

Copyright Increases Considered 104
Potential changes could significantly increase what operators pay to retransmit broadcast signals

DEPARTMENTS

BETWEEN THE LINES . . . 8
Operators gget an earful on classroom outreach ... Cablevision Systems will launch additional local news channels and Time Warner plans one for New York...A&E strikes deals at MIP.

3RD ANNUAL NETWORK PROGRAM GUIDE 39
CableVision's complete guide to program services, including basic and pay networks, pay-per-view sources, regional sports channels and even announced services not yet up and running

CABLE POLL 118
Plans for fiber installations are slowing down as operators wait for the dust to settle around major new developments

PARTING WORDS 122
HA!'s April Fool's Day surprise promotion angered some operators, amused others

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3

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INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT APRIL 23, 1990

BASIC SERVICES 42

PAY SERVICES 64

PAY-PER-VIEW SERVICES 66

HOTEL PAY-PER-VIEW SERVICES 68

AUDIO SERVICES 68

TEXT SERVICES 70

COMPUTER SERVICES 70

INTERACTIVE SERVICES 71

CROSS-CHANNEL PROMOTION SERVICES 71

SHOPPING SERVICES 71

REGIONAL BASIC SPORTS SERVICES 72

REGIONAL PAY SPORTS SERVICES 75

REGIONAL NON-SPORTS SERVICES 77

NON SATELLITE-FED BASIC SERVICES 78

NON SATELLITE-FED PAY SERVICES 78

PAY-PER-VIEW TITLE SUPPLIERS 78

CABLE/TVRO PACKAGE PROVIDERS 79

ANNOUNCED SERVICES 79

DATABASE 82

CableVision
3

Year Three For PNG

Some people mark the rite of spring by heading to the ballpark; others throw franks or burgers on the barbee and a few dust off the binoculars for a round of cherry blossom sightseeing. For *CableVision*, early spring means the release of the Program Network Guide.

Now in its third year, the Guide aims to offer a thorough, reader-friendly overview of cable program services, from the well-established to those still in the start-up stage. This year's guide provides a wider variety of data than in the past. New features include the number of national and local advertising availabilities offered in a typical hour.

CableVision senior editor Simon Applebaum edited the Program Network Guide. Greg Packer, Gary Lemons, Christina Clauson and Adrian Schwartz compiled the research. Our thanks go to the many marketing and public relations executives at the cable services who cooperated in our information gathering effort.

We hope what follows is a reference that will serve the cable industry through the seasons ahead.

Kathy Haley, Editor-in-Chief

Promotion;
Regional Offices: Susan Packard, Suite 201A, 2855 Coolidge Highway, Troy, MI 48084 (313) 643-9033; Debra Lieberman, C-288, 3000 West

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A&E
(212) 661-4500

555 Fifth Avenue
New York, NY 10017

Parent Company: Hearst/Capital Cities/ABC/NBC
Personnel: Nickolas Davatzes, President & CEO; Seymour Lesser, Executive VP CFO; Whitney Goit II, Executive VP Sales & Marketing; Robert Igiel, Senior VP Business Development; Brooke Bailey Johnson, VP Programming & Production; Peter Hansen, VP Programming; Abbe Raven, VP Production; Ronald Schneier, VP Advertising & Sales; Daniel Davis, VP Affiliate Sales & Marketing; Ted Yorio, Director, Advertising; Terry O'Neill, Director, National Sales; Susan Schulman, Director, Corporate Communications; John Schipp, Director, On-Air Promotion; Mark Mersky, Director, Local Ad Sales
Regional Offices: West Coast: 1800 Century Park East, Suite 450, Los Angeles, CA 90067, (213) 933-9600; Contacts: Coleen Griffin, Director, Ad Sales; Brian Litman, VP Affiliate Sales; Midwest: 111 E. Wacker Drive, Suite 2206, Chicago, IL 60601, (312) 819-1486; Contacts: Dave Boretti, Director Ad Sales; Ken Street, Director, Affiliate Sales
Program Hours: 24 Hours
Program Format: Comedy, drama, documentary and performing arts.
Satellite: Galaxy I/12, VideoCipher encrypted
Subscriber Information: Affiliates: 5,800 as of 02/01/90; Subscribers: 46,500,000;
Advertising Per Hour: National-6-8 minutes (depending on program length)/Local-2 minutes

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ACTS SATELLITE NETWORK
(817) 737-4011

6350 W. Freeway
Fort Worth, TX 76150

Personnel: Richard McCartney, CEO Interim President; Michael Wright, VP Affiliate Relations
Regional Offices: Deborah Little, Director ACTS Central Division; Donald Smith, Director ACTS Eastern Division
Program Hours: 24 Hours
Program Format: Inspirational
Satellite: Galaxy III/7
Subscriber Information: Affiliates: 450 as of 03/21/90; Subscribers: 9,100,000; Price/sub: Free
Advertising Per Hour: Local—1 minute

ALTERNATE VIEW NETWORK
(318) 226-8776

400 Common Street
Shreveport, LA 71101

Personnel: D. L. Dykes, President; David Caskey, General Manager; Ed Garner, Production Director; Lloyd Warren, Public Relations Director
Program Hours: 6:30 AM - 11:00 AM ET Sundays
Program Format: Live with call-in segments.
Satellite: Satcom IIIR/12
Subscriber Information: Affiliates: 1,126 as of 03/26/90; Subscribers: 17,034,974

AMERICAN MOVIE CLASSICS
(516) 364-2222

150 Crossways Park West
Woodbury, NY 11797

Parent Company: Rainbow Program Enterprises
Personnel: Joshua Sapan, President; Kate McEnroe, VP General Manager; Noreen O' Loughlin, VP Marketing; Brad Siegel, VP Programming; Rosie Pisani, VP Creative Services; Carole Shander, VP Corporate Communications; Nancy LaPerla, Director, Marketing; Jim Weiss, Publicity Manager; Caroline Bock, Publicity Manager; Susan Stanco, Publicity Assistant; Betsy O'Connor, Publicity Assistant
Regional Offices: Eastern Region: 420 Crossways Park Dr., Woodbury, NY 11797 (516) 364-1379, Contact: Dennis Patton, VP Eastern Region; Central Region: 1111 East Touhy Avenue Suite 280, Des Plaines, IL 60018 (708) 296-0272, Contact: Kate Hampford, VP Central Region; Western Region: 2450 Santa Monica Blvd. Suite 500, Los Angeles, CA 90025 (213) 453-4493, Mary Murano, VP Western Region; Southeast Region: 3 Piedmont Center, Suite 516, Atlanta, GA 30305 (404) 231-9494 Contact: Michele Roberts, Regional Director
Program Hours: 3:00 p.m.-4:30 a.m. ET Weeknights/1:00 p.m.-7:30 a.m. Weekends
Program Format: Movies, original programs on motion picture history and personalities
Satellite: Satcom IIIR/12
Subscriber Information: Affiliates: 2,100 as of 03/15/90; Subscribers: 26,000,000;

Giving You A Choice

BLACK ENTERTAINMENT TELEVISION
(202) 636-2400

1899 9th Street NW
Washington, DC 20018

Personnel: Robert Johnson, President; Jefferi Lee, VP Network Operations; Curtis Symonds, VP Affiliate Marketing; Debra Lee, VP Legal Counsel; Janis Thomas, VP Advertising; Antonia Duncan, VP Finance; James Ebron, VP Network Sales; Rosalyn Doaks, Director Affiliate Marketing; Robin Beaman, Director, Consumer Marketing & Public Relations; Janis Thomas, VP Advertising; Cheryl Holmes, Director Advertising & Research; Louis Carr, Director Midwest Advertising
Regional Offices: James Ebron, 156 West 56th Street, Suite 2004, New York, NY 10019 (212) 582-5080.
Program Hours: 24 Hours
Program Format: Music videos, sports, news, public affairs, family entertainment.
Satellite: Satcom IIR/20
Subscriber Information: Affiliates: 1,300 as of 3/1/90; Subscribers: 26,000,000; Price/sub: .06
Advertising Per Hour:N.A

Bravo®
Culture Everyone Can Turn To

BRAVO
(516) 364-2222

150 Crossways Park West
Woodbury, NY 11797

Parent Company: Rainbow Program Enterprises
Personnel: Joshua Sapan, President; Kathy Dore, VP General Manager; Jonathan Sehring, VP Programming; Rosie Pisani VP Creative Services; Carole Shander, VP Corporate Communications; Laurie Giddins, Director, Marketing; Caroline Bock, Publicity Manager; Jim Weiss, Publicity Manager; Susan Stanco, Publicity Assistant; Betsy O'Connor, Publicity Assistant; Ed Carroll, Associate Director, Marketing
Regional Offices: Eastern Region: Farmington, CT, Karen Jarmon, Director, Central Region: DesPlaines, IL, Andrew Farley, Director, Western Region: Santa Monica, CA, David Eberts, Director.
Program Format: American independent & international films, performing arts specials, music and comedy series.
Satellite: Satcom IIIR/4, VideoCipher encrypted
Subscriber Information: Affiliates: 400 as of 02/01/90; Subscribers: 4,000,000

cnbc
Consumer News & Business Channel

CNBC
(201) 585-2622

2200 Fletcher Ave.
Ft. Lee, NJ 07024

Parent Company: NBC
Personnel: Michael Eskridge, President, Tom Rogers, President, NBC Cable; Caroline Vanderlip, VP Affiliate Relations; Larry Smith, Regional VP Affiliate Relations; Jim Barry, VP Consumer Affairs; Art Miller, Senior VP Advertising Sales; Patricia Karpas, Director, Marketing; Joyce Gibney, Senior Marketing Representative; Beth St. Paul, Marketing Representative; Laurie Lawrence, Manager, Advertising & Alameda Avenue, Burbank, CA 91523 (818) 840-3487.
Program Hours: 24 Hours
Program Format: Daytime: business and financial; Evenings: consumer news.
Satellite: Satcom IIIR/6
Subscriber Information: Affiliates: 900 as of 03/01/90; Subscribers: 14,800,000; Price/sub: .09
Advertising Per Hour: National-9 minutes/Local-3 minutes

C-SPAN AMERICA*S NETWORK

C-SPAN II

C-SPAN/C-SPAN II
(202) 737-3220

400 North Capitol St. NW-Suite 650
Washington, DC 20001

Personnel: Brian Lamb, President & COO; Susan Swain, Senior VP; Rob Kennedy, Senior VP; Mike Michaelson, Executive VP; Lisa Kerr, Manager, Affiliate Relations; Peter Kiley, Supervisor, Affiliate Relations; Pat Daniel, Supervisor, Marketing; Kristin Wennberg, Press Cordinator; Cynthia Dinkins-Lassiter, Marketing Representative Special Projects; Barkley Kern, Marketing Representative Western Region; Charlotte Bowers, Marketing Representative Southeast Region; Kate Mills, Marketing Representative Midwest Region; Chris Appleby, Marketing Representative, Northeast Region; Andrea King, Marketing Representative, Midwest Region
Program Hours: 24 Hours
Program Format: Coverage of U.S. House of Representatives and public affairs on C-SPAN/Coverage of U.S. Senate and public affairs on C-SPAN II.
Satellite: Galaxy III/24
Subscriber Information: Affiliates: 3,764 as of 4/1/90 (C-SPAN); 738 as of: 4/1/90 (C-SPAN II); Subscribers: (C-SPAN); 20,100,00 (C-SPAN II); Price/sub: .04

THE WORLD'S MOST
IMPORTANT NETWORK

CABLE NEWS NETWORK
(404) 827-1503

One CNN Center
Atlanta, GA 30348

Parent Company: Turner Broadcasting System
Personnel: Burt Reinhardt, President; Ed Turner, Executive VP Newsgathering; Paul Amos, Executive VP News Programming; V.R. (Bob) Furnad, VP Senior Executive Producer; Gale Evans, VP Booking & Research; Lou Dobbs, VP Business News; John Barbera, VP, CNN Ad Sales; Robert Thalman, VP Marketing Turner Cable Network Sales (404) 827-2170; Kristina Martin, Director Marketing; Steve Haworth, Director Public Relations; Rick Salcedo, Associate VP On-Air Promotion
Regional Offices: Chicago TBS Sales, Detroit TBS Sales, Los Angeles TBS Sales, New York TBS Sales, San Francisco Turner Cable Network Sales.
Program Hours: 24 Hours
Program Format: News and information
Satellite: Galaxy I/7, VideoCipher encrypted
Subscriber Information: Affiliates: 12,590 as of 3/1/90; Subscribers: 54,400,000;
Advertising Per Hour: National-10 minutes/Local-3 minutes

CHANNEL AMERICA TV NETWORK
(212) 262-5353

24 W. 57th St.
Suite 804
New York, NY 10019

Personnel: David Post, Chairman; Robert Mauro, President; Veronica Albrecht, Director, Affiliate Relations; Alan Zaretsky, Director, Marketing;
Program Hours: 24 Hours
Program Format: General entertainment with viewer participation
Satellite: Spacenet II/3
Subscriber Information: Affiliates: 53; as of 3/20/90 (includes low-power TV); Subscribers: 170,000 (cable only);
Advertising Per Hour: National-N.A./Local-4 minutes

THE COMEDY CHANNEL
(212) 512-1000

1100 Avenue of the Americas
New York, NY 10036

Parent Company: Home Box Office
Personnel: Dick Beahrs, President; John Newton, Executive VP Programming; Linda Frankenbach, VP Affiliate Operations; Larry Divney, Senior VP Advertising Sales; David McCoy, VP National Sales Manager; Scoot MacPherson, Director, Promotion
Regional Offices: Lennox Bldg. 3399 Peachtree Road NE, Suite 1600, Atlanta, GA 30326 (404) 239-6600, Gail Sermersheim; 6250 River Road, Suite 10-300, Rosemont, IL 60018 (708) 318-5100, Bruce Zeller; 12750 Merit Drive, Suite 1200, Dallas, TX 75251 (214) 450-1000, Jerry Flavin; The Quadrant, 5445 DTC Parkway, Suite 700, Englewood, CO 80111 (303) 220-2900, Jack Hayes; 6363 NW 6th Way, Suite 410, Ft. Lauderdale, FL 33309 (305) 491-0411, Jeff Krolik; 9401 Indian Creek Parkway, Suite 850, Overland Park, KS 66210 (913) 451-5100, Sharon Bennett; 2049 Century Park East, Suite 4100, Los Angeles, CA 90067 (213) 201-9200, Janice Aull; 1100 Avenue of the Americas, New York, NY 10036 (212) 512-1000, Peter Cohan; One Bala Cynwyd Plaza, Suite 440, 231 St. Asaphs Place, Bala Cynwyd, PA 19004 (215) 668-6500, Steve Davidson; Two Embarcadero Center, Suite 840, San Francisco, CA 94111 (415) 765-7700, Janet Long
Program Hours: 24 Hours
Program Format: Hosted comedy shows plus movies.
Satellite: Galaxy I/1, VideoCipher encrypted
Subscriber Information: Affiliates: 500 as of 4/1/90; Subscribers: 6,000,000; Price/sub: .07
Advertising Per Hour: National-5 minutes/Local-3 minutes

COUNTRY MUSIC TELEVISION
(615) 255-8836

704 18th Ave. South
Nashville, TN 37203

Personnel: James Guercio, Chairman; Stan Hitchcock, Senior VP; Nan Olson, VP Advertising Sales; R.E. Turner IV, VP Sales & Marketing; Rene Ray, Director, Affiliate Relations
Program Hours: 24 Hours
Program Format: Country music Videos with interview clips
Satellite: Galaxy I/13
Subscriber Information: Affiliates: 1,878 as of 02/28/90; Subscribers: 10,544,117
Advertising Per Hour: National-N.A./Local 3 minutes

THE DISCOVERY CHANNEL
(301) 577-1999

8201 Corporate Drive
Landover, MD 20785

Parent Company: Cable Educational Network Inc.
Personnel: John Hendricks, Chairman & CEO; Ruth Otte, President & COO; Greg Moyer, Senior VP Programming Group; Kathy Clinton, Senior VP Advertising Sales; Sandy McGovern, Senior VP Affiliate Sales & Relations; Chuck Gingold,

Senior VP Programming; Chris Moseley, Senior VP Marketing & Communications; Valerie Grady, VP Marketing; Eric McLamb, Director, Communications; Lila Reinhard, Director, Affiliate Marketing; Greg Laskaris, Director, Marketing/Interactive Publishing; Shirley Davis, Director, Ad Sales
Regional Offices: New York, Kathy Clinton, 415 Madison Avenue, New York, NY 10017 (212) 751-2120; San Francisco-Dawn McCall, 601 California Street, Suite 1808, San Francisco, CA 94108 (415) 391-9300; Los Angeles-Gary Evans, 1888 Century Park East, #1900, Los Angeles, CA 90067 (213) 284-6897; Chicago-Sandi Tracy, 625 North Michigan Avenue, Suite 500, Chicago, IL 60601 (312) 751-4265.
Program Hours: 24 Hours
Program Format: Documentaries on nature, science and technology, history, human adventure and world exploration.
Satellite: Galaxy I/22
Subscriber Information: Affiliates: 7,535 as of 3/1/90, Subscribers: 49,700,000
Advertising Per Hour: National-7 minutes/Local-2 minutes

ESPN
(212) 916-9200

605 Third Avenue
8th Floor
New York, NY 10158-0180
Parent Company: Capital Cities/ABC
Personnel: Roger Werner, President & CEO; Steve Bornstein, Executive VP; Roger Williams, Senior VP Affiliate Marketing; Bill Ketcham, Senior VP Consumer Marketing; Andy Brilliant, Senior VP International; Ed Duvso, Senior VP Chief Legal Counsel; Jack Bonanni, Senior VP Advertising Sales
Regional Offices: Bristol-ESPN Plaza, Bristol, CT 06010; 9665 Wilshire Boulevard, Suite 800, Beverly Hills, CA 90212; 5445 DTC Parkway, Suite P-8, Englewood, CO 80111;Boulevard Towers South, 205 North Michigan Avenue, Suite 3914, Chicago, IL 60601.
Program Hours: 24 Hours
Program Format: Sports
Satellite: Galaxy 1, VideoCipher encrypted
Subscriber Information: Affiliates: 21,500 (including MMDS & SMATV systems) as of 4/1/90; Subscribers: 55,340,000
Advertising Per Hour: National-8 minutes/Local-2 minutes (4 on NFL games)

ETERNAL WORD TV NETWORK
(205) 956-9537

5817 Old Leeds Road
Birmingham, AL 35210
Personnel: Mother Angelica, Foundress/Chairman; Bill Steltemeier, President; Matt Scalici, Senior VP Engineering & Satellite Operations; Chris Harrington, Senior VP Operations & Production; Marynell Ford, Senior VP Marketing; Nancy Gilmore, Affiliate Relations Manager; Dee Park, Public Relations Manager; Richard King, Director, Programming
Program Hours: 24 Hours
Program Format: Family-oriented, spiritual growth programming
Satellite: Galaxy III/10
Subscriber Information: Affiliates: 650 as of 04/01/90; Subscribers: 14,100,000

THE FAMILY CHANNEL
(804) 523-7301

1000 Centerville Turnpike
Virginia Beach, VA 23463
Parent Company: International Family Entertainment
Personnel: Timothy Robertson, President; Richard Busciglio, VP Marketing; Paul Krimsier, VP Programming; Richard Hammer, VP Advertising Sales; Craig Sherwood, VP Affiliate Relations; Earl Weirich, VP Public Relations; Madeleine Forrer, Director, Marketing Services; Ralph Trentadue, National Director, Local Ad Sales; Diana Wittenberg, Affiliate Marketing Manager; Julia Wang, National Promotions Manager; Doug Stuart, Director, Marketing Resources;
Regional Offices: 5935 Highway 18, Suite A, Jackson, MS (601) 922-0181, Clay Boudreaux; Four Militia Drive, Lexington, MA 02173 (617) 862-7773, Don Scott; 1301 West 22nd St., Suite 902, Oak Brook, IL 60521 (708) 990-8999, Shirley Hill; 4001 Westerly Place, Suite 16, Newport Beach, CA 92660 (714) 955-2870, Janelle Slipp; 1001 West Euless Blvd., Suite 112, Euless, TX 76040 (817) 540-3677, Mark Solow; 6075 South Quebec, Suite 100, Englewood, CO 80111 (303) 220-8901, Howard Williams; 1895 Phoenix Blvd., Suite 306, Atlanta, GA 30349 (404) 997-5704, Russ Breault; Mid-Atlantic Office, 1000 Centerville Turnpike, Virginia Beach, VA 23463 (804) 523-7300, Stan Majkut.
Program Hours: 24 Hours
Program Format: Family entertainment
Satellite: Galaxy I/11; Satcom IR/1 VideoCipher encrypted
Subscriber Information: Affiliates: 8,774 as of 02/28/90; Subscribers: 48,840,000; Price/sub: .08
Advertising Per Hour: National-10 minutes/Local-2 minutes

FAMILY GUIDE NETWORK
(215) 887-7010

Penthouse Suite
Fox Pavilion
Jenkintown, PA 19046
Personnel: Don De Cinque, VP; Bob DeBoxace, Director, Media Operations; Joe McKencie, National Sales Manager; Alex Bowale, Affiliate Relations Representative; Jim Foster, Affiliate Relations Representative
Program Hours: Varies
Program Format: Direct-response

infomercials and lifestyle features
Satellite: Satcom IV/16
Subscriber Information: Affiliates: 60 as of 4/9/90; Subscribers: 5,000,000

FAMILYNET
(804) 845-4733

PO Box 196
Forest, VA 24551-0196
Parent Company: Liberty Broadcast Network
Personnel: Richard Campbell, VP; Warren Marcus, Executive Producer; Jerry Whitehurst, Director, Affliate Marketing & Programming
Program Hours: 24 Hours
Program Format: Family Entertainment, inspirational sports and classic movies
Satellite: Satcom IV/5
Subscriber Information: Affiliates: 356 as of 03/23/90; Subscribers: 4,000,000
Advertising Per Hour: National-N.A./Local-1 minute

FINANCIAL NEWS NETWORK
(213) 670-1100

6701 Center Drive West
Los Angeles, CA 90045
Parent Company: Financial News Network
Personnel: Michael Wheeler, President; Earl Brian, Chairman & CEO; John Berentson, Executive VP; C. Steven Bolen, Executive VP & CFO; Gil Faccio, Senior VP Affiliate Relations; Richard North, Senior VP Advertising Sales; Thomas Lucas, VP Marketing
Regional Offices: 320 Park Avenue, New York, NY 10102; 435 N. Michigan Ave., Chicago, IL 60611
Program Hours: 24 Hours weekdays; 1:00 a.m.-2:00 p.m. ET weekends
Program Format: Business news
Satellite: Satcom IIIR/11, VideoCipher encrypted
Subscriber Information: Affiliates: 3,500 as of 04/01/90; Subscribers: 33,000,000
Advertising Per Hour: National-10 minutes/Local-2 minutes

FNN SPORTS
(213) 670-1100

6701 Center Drive West
Los Angeles, CA 90045
Parent Company: Financial News Network
Personnel: Arnie Rosenthal, Executive VP General Manager; Joe Safety, Executive Producer; Steve Friedman, Assistant General Manager; Mark Huvska, Senior Producer;
Regional Offices: George Monaster, 320 Park Ave., New York, NY 10022 (212) 758-9009; John Fagan, 435 N. Michigan Ave., Chicago, IL 60611 (312) 6722-0255.
Program Hours: 2:00 p.m.- 1:00 a.m. ET, weekends
Program Format: Sports news/events.
Satellite: Satcom III-R/11, VideoCipher encrypted
Subscriber Information: Affiliates: 2,000 as of 04/01/90; Subscribers: 23,000,000; Price/sub: Included in FNN fee
Advertising Per Hour: National-10 minutes/Local-2 minutes

GALAVISION
(213) 286-0126

2121 Avenue of the Stars
Suite 2300
Los Angeles, CA 90067
Parent Company: Univisa
Personnel: Jaime Davila, Group VP; Starrett Berry, VP Cable Operations; Stu Livingston, VP Broadcasting Operations; Vera Gonzales, National Director;
Regional Offices: Vera Gonzalez, Galavision Dallas Office, 15851 N. Dallas Parkway, Suite 1015, Addison, TX 75248
Program Hours: 24 Hours
Program Format: Spanish-language television: classic Mexican films, novellas (soap operas), international sports, children's programming, comedy and variety shows. Also incorporates ECO, a global news and international service live from Mexico City.
Satellite: Galaxy I/20
Subscriber Information: Affiliates: 310 as of 01/01/90; Subscribers: 2,500,000;
Advertising Per Hour: National-N.A./Local-2 minutes

HA! THE TV COMEDY NETWORK
(212) 713-6600

1775 Broadway
New York, NY 10019
Parent Company: MTV Networks
Personnel: Ed Bennett, President; Barry Kluger, VP Press Relations; Debby Beece, Senior VP Programming; Mike Klinghoffer, VP Production; Leslye Schaefer, VP Marketing & Promotions; Sam Moser, Director Advertising Sales/Eastern Region
Regional Offices: Western Region: 10 Universal City Plaza, 30th floor, Universal City, CA 91608 (818) 505-7800; Southeastern Region: 3399 Peachtree Road, Suite 900, North East, Atlanta, GA 30326, (404) 841-3099; Southwestern: 5000 Quorum, Suite 425, Dallas, TX 75240 (214) 404-0793; Central: 303 E. Wacker Drive, Suite 428, Chicago, IL 60601, (312) 565-2300; Detroit Ad Sales Office: 2301 W. Big Beaver Road, Suite 621, Troy, MI 48084, (313) 649-7170.
Program Hours: 24 Hours
Program Format: Comedy
Satellite: Galaxy III/23
Subscriber Information: N.A.
Advertising Per Hour: National-8 minutes/Local-3 minutes

HEADLINE NEWS

HEADLINE NEWS
(404) 827-1500

One CNN Center
PO Bx 105366
Atlanta, GA 30348-5366
Parent Company: Turner Broadcasting System

Personnel: Burt Reinhardt, President; Jon Petrovich, Executive VP
Program Hours:24 hours
Program Format: World and national news summaries, updated every half-hour
Satellite: Galaxy I/8 **Subscriber Information:** Affiliates: 4,671 as of 4/1/90; Subscribers: 41,000,000
Advertising Per Hour: National-10 minutes/Local-2 minutes

THE INSPIRATIONAL NETWORK
(704) 542-6000

P.O. Box 410325
Charlotte, NC 28241-0325
Parent Company: Heritage Village Church
Personnel: Dennis Shedd, Trustee; John Pope, Operations Manager; Lois Chalmers, Marketing Consultant
Program Hours: 24 Hours
Program Format: Multi-faith programming; music, talk, variety, childrens' shows, exercise, family programming.
Satellite: Galaxy I/17
Subscriber Information: Affiliates: 814 as of 02/28/90; Subscribers: 6,800,000

KTLA/UNITED VIDEO
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Parent Company: United Video
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales; Reuben Gant, VP Corporate Accounts; Derk Tenzythoff, Manager, Marketing; John Hawkins, Manager, Advertising & Promotions; Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations;
Program Hours: 24 Hours
Program Format: Superstation featuring sports, movies, series, kids shows and specials.
Satellite: Spacenet III/8
Subscriber Information: Affiliates: 253 as of 12/31/89; Subscribers: 4,900,000; Price/sub: .10

KTVT/UNITED VIDEO
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Parent Company: United Video
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales; Reuben Gant, VP Corporate Accounts; Derk Tenzythoff, Manager, Marketing; John Hawkins, Manager, Advertising & Promotions; Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations;
Program Hours: 24 Hours
Program Format: Superstation programming, featuring sports, movies, kids shows, specials and series.
Satellite: Spacenet III/3, VideoCipher encrypted
Subscriber Information: Affiliates: 481 as of 12/31/89; Subscribers: 3,600,000; Price/sub: .10

The Learning Channel
The smart choice on cable.

THE LEARNING CHANNEL
(703) 276-0881

1525 Wilson Blvd.
Suite 550
Rosslyn, VA 22209
Personnel: Dr. Harold Morse, Chairman & CEO; Robert Shuman, President; Henry Schlenker, Senior VP & CFO; Edward Dooley, Director, Corporate Communications; Lee Lindbloom, Director, Networking Services; Robert Sestili, VP Programming; Joan Cavanagh, Director, Corporate Development; Edward Burakowski, National Sales Director; John McLaurin, VP Marketing
Regional Offices: Richard Conlon, Director, Marketing East: 7 Woodland Ave., Larchmont, NY 10538 (914) 833-1320; Jay Barchas, Director, Marketing Western:535 16th Street, Denver, CO 80202 (303) 592-1613 FAX (303) 592-1716.
Program Hours: 24 Hours
Program Format: Educational, business and career
Satellite: Satcom IIIR/2
Subscriber Information: Affiliates: 1,228 as of 02/28/90; Subscribers: 19,200,000
Advertising Per Hour: National-12 minutes/Local-N.A.

LIFETIME
TELEVISION

LIFETIME
(718) 482-4000

36-12 35th Avenue
Astoria, NY 11106
Parent Company: Hearst/ABC-Viacom Entertainment Services
Personnel: Thomas Burchill, President and CEO; Craig Harnett, Senior VP & CFO; Pat Fili, Senior VP Programming & Production; Stuart Lefkowitz, Senior VP Operations & Engineering; Phillip La Greca, VP Controller; Seymour Kaplan, Senior VP Affiliate Relations; Barry Kresch, Senior VP Research; Jane Tollinger, Senior VP Business & Legal Affairs; Douglas McCormick, Senior VP Sales; Margaret Sandwick, Senior VP Marketing & Communications; Diane Lattanzi, Director, Sales Marketing
Regional Offices: 10990 Wilshire Blvd., Suite 2010, LA, CA 90024, (213) 446-6600; 75 East Wacker Drive, Ste. 900, Chicago, IL 60601, (312) 782-5900; 12860 Hillcrest Road, Cohuenza, Ste. 229, Dallas, TX 75235, (214) 960-0271; 444 Madison Ave., Ste. 605, New York, NY 10022, (212) 832-8832
Program Hours: 24 Hours
Program Format: Entertainment and information of special interest to women on weekdays and Saturdays; medical information series for professionals Sundays
Satellite: Satcom III-R/17; Galaxy III/20; Scrambled

Subscriber Informaiton: Affiliates: 4,700 as of 2/90; Subscribers: 47,000,000; Price per sub: .12
Advertising Per Hour: National-8 to 10/Local-2 minutes

MIND EXTENSION UNIVERSITY
(303) 792-3111

9697 E. Mineral Avenue
Englewood, CO 80112
Parent Company: Jones International Ltd.
Personnel: Glenn Jones, Chairman and CEO; Gregory Liptak, Group President; Victor Harrison, General Manager, Programming; Gwenael Hagan, Director, Concept Integration; Cindy Eichner, Affiliate Sales Manager, West; Chery Grund, Affiliate Sales Manager, East; Adrienne Thiele, Product Marketing Manager; Sharon Sall, Affiliate Relations Coordinator; Andrea Montoni, Public Relations Manager;
Program Hours: 24 Hours
Program Format: College-credit telecourses and non-credit, instructional programming
Satellite: Galaxy III/11
Subscriber Information: Affiliates: 188 as of 01/12/89; Subscribers: 5,000,000; Price/sub: .03 for 24 Hours/1.5 part-time

MIZLOU
SNN
SPORTS NEWS NETWORK

MIZLOU SPORTS NEWS NETWORK
(212) 244-3750

352 Seventh Ave.
New York, NY 10001
Parent Company: Mizlou Communications Co.
Personnel: Vincent Piano, Chairman & CEO; Victor Piano, President; Mark Wenzel, Executive VP; Bill Schwing, VP Executive Producer; Jon Steinlauf, Executive VP; Stan Leshner, VP Operations & Engineering; Lawrence Meli, SNN Executive Committee Member; Paul Green, Senior VP Advertising Sales; Ronald Norberg, VP National Accounts; Kathleen Curran, Advertising & Marketing Manager; John Barry, Advertising Sales Account Executive; Cary Miller, Advertising Sales Account Executive
Regional Offices: Chicago Affiliate Sales Office-Ronald Norberg (708) 213-7340
Program Hours: 24 Hours
Program Format: Sports news divided into half-hour segments
Satellite: Satcom IV/2
Subscriber Information: Affiliates: N.A.; Subscribers: 5,000,000; Price/sub: .05
Advertising Per Hour: National-8 minutes/Local-3 minutes

E
ENTERTAINMENT
TELEVISION

MOVIETIME/E!
(213) 960-5800

1800 North Vine
3rd Floor
Hollywood, CA 90028
Personnel: Lee Masters, President & CEO; Bill Keenan, Senior VP CFO; Chris Fager, Senior VP Business & Legal Affairs; Bill Zaccheo, Senior VP Affiliate Sales; Fran Shea, Senior VP Programming; Sheri Herman, Senior VP Marketing; Mike Sobel, Senior VP Advertising Sales; Ron Ourashi, Director, Marketing; John Kroll, Director, Corporate Communications
Regional Offices: NY Ad Sales: 245 East 58th St., #4F, New York, NY 10022 (212) 223-3700, Ned Greenburg; NY Affiliate Sales: 10 Columbus Boulevard, Hartford, CT 06106 (203) 249-3700, Brad Fox; Chicago Ad Sales: 333 North Michigan Avenue, #1710, Chicago, IL 60601 (312) 609-0360, Dan Lusk; Dallas Ad Sales: 109 North Gollad, Rockwali, TX 75087 (214) 771-5040, Kent Smith; Michigan Ad Sales: 2009 Shady Drive, Warren, MI 48092 (313) 751-3474, Bill Adams.
Program Format: Entertainment, celebrity news and features.
Satellite: Satcom IIIR/15
Subscriber Information: Affiliates: 500 as of 3/1/90; Subscribers: 14,000,000;
Advertising Per Hour: National-5 minutes, Local-3 minutes
NOTE: Movietime will change to E! Entertainment TV June 1.

MTV: MUSIC TELEVISION
(212) 713-6400

1775 Broadway
New York, NY 10019
Parent Company: MTV Networks
Personnel: Tom Freston, Chairman & CEO; John Reardon, President, Geenlan & Rosenthal; Doug Herzog, Senior VP Programming MTV; Judy McGrath, Senior VP Creative Director; Carole Robinson, VP Press Relations; Harriet Seitler, Senior VP Advertising Sales; Doug Greenlaw, Executive VP Advertising Sales; Mark Rosenthal, Executive VP Affiliate Sales & Marketing
Regional Offices: Eastern Region: 1775 Broadway, 20th Floor, New York, NY 10019 (212) 713-6931; Central Region: 303 E. Wacker Drive, Suite 428, Chicago, IL 60601 (312) 565-2300; Detroit Ad Sales Office: 2301 W. Big Beaver Rd., Suite 621, Troy, MI 48084 (313) 649-7170; Network Operations Center: 35 Adams Ave., Hauppauge, NY 11788 (516) 435-4900; Southeastern Region: 3399 Peachtree Road, Suite 990, North East, Atlanta, GA 30326 (404) 841-3099; Western Region: 10 Universal City Plaza, 30th Floor, Universal City, CA 91608 (818) 505-7800; Southwestern Region: 5000 Quorum, Suite 425, Dallas, TX 75240 (214) 404-0793; **Program Hours:** 24 Hours
Program Format: Video music, news, specials
Satellite: Galaxy III/17
Subscriber Information: Affiliates: 6,015 as of 3/1/90; Subscribers: 50,700,000;
Advertising Per Hour: National-6 minutes/Local-2 minutes

TNN

THE NASHVILLE NETWORK
(615) 889-6840

2806 Opryland Drive
Nashville, TN 37214

Program Format: Nickelodeon: children's programming which includes animation, comedy, adventure, live action, music & magazine shows. Nick at Nite classic TV programs presented in an irreverant environment
Satellite: Galaxy III/19,22; VideoCipher encrypted
Subscriber Information: Affiliates: 7,555 (Nickelodeon); 3,725 (Nick At Nite) as of 4/1/90; Subscribers: 50,400,000 (Nickelodeon); 46,500,000 (Nick At Nite)
Advertising Per Hour: National-N.A./Local-2 minutes
Parent Company: Opryland USA Inc. Nashville, TN 37214
Personnel: E.W. Wendell, President & CEO Opryland USA; Tom Griscom, Senior VP Opryland USA; David Hall, VP General Manager; C. Paul Corbin, Director, Programming; Danny Wendell, Operations Manager; Hugh Hickerson, Director, Engineering; Lloyd Werner, Senior VP Sales & Marketing; Peter Weisbard, VP Sales; Kathleen Canavan, VP Marketing; Cheryl Daly, VP Public Relations; Cindy Melvin, Director, Marketing
Regional Offices: Group W Satellite Communications, 250 Harbor Dr., Stamford, CT 06904 (203) 965-6000; Peter Weisbard, Group W Satellite Communications, 685 Third Ave., 20th Floor, New York, NY 10017 (212) 916-1000; Walter Bodkin, Suite 420, 625 N. Michigan Ave., Chicago, IL 60611 (312) 454-7090; Bob Van Cleave, 31000 Telegraph Rd. Suite 200, Birmingham, MI 48010 (313) 540-2900; John Milne, 6500 Wilshire Blvd., Suite 1850, Los Angeles, CA 90048 (213) 655-1098.
Program Hours: 18 hours
Program Format: Country music, lifestyle, sports and variety.
Satellite: Galaxy I/2
Subscriber Information: Affiliates: 9,376 as of 03/29/90; Subscribers: 50,000,000; Price, sub: .15 per sub
Advertising Per Hour: National-N.A./Local-2 minutes

NATIONAL COLLEGE TV
(212) 689-0088

1 Madison Avenue
New York, NY 10010

Parent Company: NCTV Inc.
Personnel: Jeffrey Moritz, President; Marilyn Freeman, Senior VP General Manager; Victor Shaffer, Senior VP General Sales Manager; Tina Witcher, VP Programming & Operations; Chip Nowitzky, VP Marketing & Creative Services; Daniel Geller, Publicity Manager; John Nelson, Sales Director; Mark Lieber, Sales Director; Donna McGowan, Research Manager; Linda Wynn, Promotions Coordinator; Toni Fama, Affilate Relations Manager
Program Hours: Midnight to 6:00 a.m. ET weekdays
Program Format: Collegiate entertainment, news & information.
Satellite: Westar V/2X
Subscriber Information: Affiliates: 200 as of 3/12/90; Subscribers: 5,600,000; Price, sub: .03
Advertising Per Hour: National-N.A./Local-2 minutes

NETWORK SERVICES
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145

Parent Company: United Video
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales; Reuben Gant, VP Corporate Accounts; Derk Tenzythoff, Manager, Marketing; John Hawkins, Manager, Advertising & Promotions; Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations
Program Hours: 24 Hours
Program Format: Satellite-delivered broadcast programming package from Detroit, made up of ABC, CBS, NBC and PBS affiliates.
Satellite: Anik D1/9,10,21,23 VideoCipher encrypted
Subscriber Information: Affiliates: 140 as of 12/31/89; Subscribers: 451,948; Price, sub: varies

NICKELODEON/NICK AT NITE
(212) 713-6409

1775 Broadway
9th Floor
New York, NY 10019

Parent Company: MTV Networks
Personnel: Geraldine Laybourne, President; Rich Cronin, Senior VP Marketing; Geoffrey Darby, Senior VP Programming; Andy Bamberger, VP Production Studios; Scott Webb, VP Creative Director; Anne Sweeney, VP Acquisitions; Douglas Greenlaw, Executive VP Advertising Sales MTVN; Michelle Dilorenzo, VP New Business Development; Frank Hensan, VP Sales & Marketing Communications; Howard Shimnel, VP Audience Research; Larry Jones, Marketing Manager
Regional Offices: Western Region: 10 Universal City Plaza, 30th floor, Universal City, CA 91608 (818) 505-7800; Southeastern Region: 3399 Peachtree Road, Suite 900, North East, Atlanta, GA 30326, (404) 841-3099; Southwestern: 5 00 Quorum, Suite 425, Dallas, TX 75240 (214) 404-0793; Central: 303 E. Wacker Drive, Suite 428, Chicago, IL 60601, (312) 565-2300; Detroit Ad Sales Office: 2301 W. Big Beaver Road, Suite 621, Troy, MI 48084, (313) 649-7170.
Program Hours: 24 Hours (6:00 a.m.-8:00 p.m. ET Nickelodeon/ 8:00 p.m.-6:00 a.m. ET Nick at Nite)

THE NOSTALGIA CHANNEL
(212) 463-7740

71 West 23rd Street, Suite 502
New York, NY 10010
The Nostalgia Network Inc.
Personnel: Michael Marcovsky, Chairman; John Janas, President & CEO; Morgan Lambert Howe, Senior VP Affiliate Sales; Robert Jones, VP Programming
Regional Offices: Western-2144 Royal Lane, Ste. 150, Dallas, TX 75229 (214) 243-8755 Chip Harwood; Northeast-75 James Way, Southampton, PA 18966 (215) 364-7550 Terri Morse; Pacific-1311 El Camino Real, Ste. 205, Millbrae, CA 94030 (415) 589-5246 Lynn; Central-2050 Larkin Ave., Ste. 203, Elgin, IL 60123 (708) 697-5454 Paul Hamilton; Southeast-4651 Charlotte Pk. Dr. Ste. 425, Charlotte, NC 28217 (704) 527-0994 Leah Bradley
Program Hours: 24 Hours
Program Format: Variety - contemporary lifestyle; entertainment, information
Satellite: Satcom IV/21
Subscriber Information: Affiliates: 530 as of 4/3/90; Subscribers: 8,540,000; Price per sub: variable
Advertising Per Hour: National-8 minutes/Local-2 minutes

PREVUE GUIDE
(918) 665-6690

3801 South Sheridan
Tulsa, OK 74145
Parent Company: Prevue Networks Inc.
Personnel: Joe Batson, VP Chief Operating Officer; Wm. Chris Bourne, VP Marketing & Operations; Mary Prodger, VP Programming, Production; Donna Davis, Director, Affiliate Sales; Elaine Estes, Director National Accounts
Program Hours: 24 hours
Program Format: Cable program promotion.
Satellite: Satcom IV/8
Subscriber Information: Affiliates: 610 as of 02/28/90; Subscribers: 15,243,208; Price, sub: $ .03
Advertising Per Hour: Local-9 minutes

PRIME NETWORK
(214) 401-0099

600 East Las Colinas Blvd.
Suite 2200
Irving, TX 75039
Parent Company: Bill Daniels/ Tele-Communications Inc.
Personnel: Ed Frazier, CEO & President; Mat Tinley, Executive VP; Joe King, Senior VP Operations; Jack Stanfield, Senior VP Programming; Lynn Geick, Chief Financial Officer; Lynne Niemiec, Director, Programming; John Daly, Director, Program Origination; Jay Finegold, VP Special Projects; Jon Heidtke, Director, Affiliate Sales, Marketing.; Terry Chile, Senior Manager, Affiliate Relations; Cindy Harrington, Director, Marketing; Jay Finegold, Group W/National Ad Sales
Program Hours: 11:00 a.m.- 6:00 a.m. ET
Program Format: Sports
Satellite: Satcom 1R/24, VideoCipher encrypted
Subscriber Information: Affiliates; N.A.; Subscribers: 18,500,000 (includes regional network subscribers);
Advertising Per Hour: National-N.A./Local-2 minutes

RFD-TV
(402) 345-2322

2615 Farnam St.
Omaha, NE 68131
Parent Company: Gottsch Feeding Corporation
Personnel: Bob Gottsch, President; Jack Malstead, Director, Advertising; Patrick Gottsch, Director, Affiliate Relations, Marketing; Mike Miller, News Director; Terry Dufford, Director of Engineering
Program Hours: 24 Hours
Program Format: Rural news, weather, markets, western movies, gardening, rodeo, outdoor, and special event coverage
Satellite: Westar V/17
Subscriber Information: Affiliates: 66; as of 3/1/90; Subscribers: 100,000; Price, sub: .10
Advertising Per Hour: National-14 minutes/Local-4 minutes

THE SILENT NETWORK
(213) 464-7446

6363 Sunset Blvd.
Los Angeles, CA 90028
Personnel: Sheldon Altfeld, Chairman & CEO; William Tauber, President & COO; Lou Miles, VP Marketing
Program Hours: 9:30 a.m. - 11:30 a.m. ET Thursdays and Saturdays
Program Format: Family programming; material customized for deaf and hearing-impaired viewers
Satellite: Satcom IV/15
Subscriber Information: Affiliates: 209 as of 1/1/90; Subscribers: 13,600,000;
Advertising Per Hour: National-10 minutes/Local-1 minute

SPORTSCHANNEL AMERICA
(516) 364-2222

150 Crossways Park West
Woodbury, NY 11797
Parent Company: Cablevision Systems/NBC
Personnel: Jim Greiner, President & COO; Jeff Ruhe, Senior VP Executive Producer; Sharon Portin, VP Affiliate Sales & Marketing; Peter Knobloch, Senior VP Advertising Sales; Mike Lardner, VP Programming & Production; Tom Karsch, Director, Marketing; Dan Martinsen, Director, Media Relations
Regional Offices: James Cofer, Stan Berizzi-150 Crossways Park West, Woodbury, NY 11797 (516) 364-2222; Tom Fennell-3341 Peachtree Corners Circle, #3385-H, Norcross, GA 30092 (404) 368-1113.
Program Hours: 6:00 PM - 1:00 AM ET weekdays; 10:00 AM -1:00 AM ET weekends
Program Format: Sports coverage.
Satellite: Satcom IV/3,10
Subscriber Information: Affiliates: 579 as of 01/01/90; Subscribers: 9,000,000 (includes regional sports network subscribers);
Advertising Per Hour: National-N.A./Local-4 minutes

TBS

TBS SUPERSTATION
(404) 827-1575

1050 Techwood Drive
Atlanta, GA 30348
Parent Company: Turner Broadcasting System
Personnel: Gerry Hogan, President, Turner Entertainment Networks; Bob Levi, Executive VP; Kate McSweeny, VP Programming; Bill Cox, VP Programming; Julia Sprunt, VP Marketing; Farrell Reynolds, VP TB Sales
Program Hours: 24 Hours
Program Format: Entertainment, sports, movies, environment programs.
Satellite: Galaxy I/18, VideoCipher encrypted
Subscriber Information: Affiliates: 10,296 as of 03/15/90; Subscribers: 53,848,000; Price, sub:0
Advertising Per Hour National-N.A./No local minutes
Program Hours: 24 Hours
Program Format: Spanish-language programming, featuring news, sports, talk, variety, educational and game shows
Satellite: Spacenet II/5
Subscriber Information: Affiliates: 36 as of 03/01/90; Subscribers: 1,345,000 (Spanish-language households)
Advertising Per Hour: National-7 minutes/Local-N.A.

TELEMUNDO
(212) 492-5500

1740 Broadway
New York, NY 10019
Parent Company: Reliance Group
Personnel: Saul Steinberg, Chairman, President & CEO; Donald Raider, Executive VP COO; Peter Housman II, Senior VP Treasurer & CFO; Carlos Barba, Senior VP Programming & Promotion; Gary McBride, Senior VP Sales & Marketing; Donald Travis, VP General Sales Manager; Peter Roslow, Director, Marketing; Maureen Russo, Director, Advertising & Sales Support; Carmen Mathews, Manager, Cable Relations
Regional Offices: Sylvia Mendoza-6300 Wilshire Blvd., Suite 1510, Los Angeles, CA 90048 (213) 658-6868; Andrea D'Amico-1740 Broadway, 18th Floor, New York, NY 10019 (212) 492-5591; Olga Luis-2340 West 8th Ave., Hialeah, FL 33010 (305) 888-5151; Tom Morrison-435 N. Michigan Ave., Suite 1310, Chicago, IL 60611 (312) 321-1911; Roger Ashley-1140 One Lincoln Center, 5400 LBJ Freeway, Dallas, TX 75240 (214) 661-2560; Suzanne Avila Armstrong-505 Sansome Street, San Francisco, CA 94111 (415) 421-4848.

THE TRAVEL CHANNEL

THE TRAVEL CHANNEL
(212) 603-4500

1370 Avenue of the Americas
New York, NY 10019
Personnel: Luann Simpson, President; Allan Goldstein, Director, Affiliate Sales; Robert Pronovost, Executive Producer; A. Douglas Gumula, Controller; Sheri Daniel, Director, Marketing; Adrian Bogart III, Director, Advertising Sales; Amy Weisman, Sales Promotion Manager
Regional Offices: Northeastern Region: Allan Goldstein, 1370 Avenue of the Americas, New York, NY 10019 (212) 603-4512; Southeastern Region: Sandra Mosiello, 1370 Avenue of the Americas, New York, NY 10019 (212) 603-4522; Western Region: Joe Liske, 1545 Wilshire Boulevard, Suite 408, Los Angeles, CA 90017 (213) 413-7288; Mid-America: Patty McCaskill, 4080 Wedgeway Court, St. Louis, MO 63045 (314) 293-6322.
Program Hours: 24 Hours
Program Format: Travel news and documentary programs
Satellite: Satcom IIIR/16
Subscriber Information: Affiliates: 550 as of 3/01/90; Subscribers: 14,500,000;
Advertising Per Hour: National-10 minutes/Local-2 minutes

TBN
Cable
Network

TRINITY BROADCASTING NETWORK
(303) 650-5515

9020 Yates St.
Westminster, CO 80030
Personnel: Paul Crouch, President; Ben Miller, Chief Engineer; Jack Hightower, National Cable Marketing Director
Regional Offices: Diane Adcock, Eastern Regional Representative, 175 South Main St., Gadsden, AL 35901 (205) 547-4443; Bob Higley, Great Lakes Regional Representative, 2528 U.S. 31 South, Greenwood, IN 46143 (317) 535-5542.
Program Hours: 24 Hours
Program Format: Religious
Satellite: Satcom IIIR/3
Subscriber Information: Affiliates: 903 as of 03/01/90; Subscribers: 12,800,000;

TNT
TURNER NETWORK TELEVISION

TURNER NETWORK TELEVISION
(404) 827-1647

1050 Techwood Drive
Box 105264
Atlanta, GA 30348-5264
Parent Company: Turner Broadcasting System Inc.
Personnel: Gerry Hogan, President, Turner Entertainment Networks; Scott Sassa, Executive VP TNT; Linda Berman, Senior VP Original Programing; Terry Segal, VP & General Manager; Betty Cohen, VP Creative Services; Lisa Mateos, Director, Program Scheduling & Acquisitions; Farrell Reynolds, VP TB Sales; Lou LaTorre, Executive VP TEN Sales; Sue Kroll, Director, Marketing
Regional Offices: New York- Lou LaTorre (202) 692-6900; Chicago-Mike Neri (321) 645-8500; Atlanta-John Withers (404) 827-1700; Los Angeles-Sue Danaher (213) 551-6300; Detroit- Gene Boivin (313) 259-4622.
Program Hours: 24 Hours
Program Format: Classic movies, original specials, children's programming & sports
Satellite: Satcom IIIR/18, VideoCipher encrypted
Subscriber Information: Affiliates: 5,068 as of 03/15/90; Subscribers: 43,700,000;
Advertising Per Hour: National-6 minutes/Local-4 minutes

UNIVISION
(212) 867-6710

605 Third Avenue
12th FL
New York, NY 10158-0180
Parent Company: Univision Holdings Inc.
Personnel: J. William Grimes, President & CEO; Andrew Goldman, VP Business Affairs; Emma Carrasco, VP Corporate Communications; Susan Catapano, Director Affiliate Relations; Daniel Huertas, West Coast Affiliate Relations Manager; Fernando Gomez, Central Affiliate Relations Manager
Regional Offices: Martin Dugan, Sales Manager, 9200 Sunset Boulevard, Suite 1130, Los Angeles, CA 90069 (213) 859-7200; Hilary Dubin, Sales Manager, 2010 Main Street, Suite 590, Irvine, CA 92714, (714) 474-8585; Brian Pussilano, Sales Manager, One Magnificent Mile, Suite 1120, (312) 944-2199 Barry Kandel: Sales Manager, Univision, 550 Biltmore Way, Suite 760, Coral Gables, FL 33134 (305) 444-0800 Jack Hobbs: Sales Manager, Univision, 600 East Las Colinas Boulevard, Suite 348, Irving, TX 75039 (214) 869-0202 Cynthia Saucedo, Sales Manager, 601 Montgomery Street, Suite 2015, San Francisco, CA 94111, (415) 392-2006 Chris Roman, Sales Manager, 30700 Telegraph Road, Suite 3640, Birmingham, MI 48010 (313) 540-5705
Program Hours: 24 Hours
Program Format: Spanish-Language
Satellite: Galaxy I/6 & Satcom IIIR/7
Subscriber Information: Affiliates: 533 as of 01/1/90; Subscribers: 5,942,600 (Spanish-language households);
Advertising Per Hour: N.A.

USA NETWORK
(212) 408-9100

1230 Avenue of the Americas
New York, NY 10020
Personnel: Kay Koplovitz, President & CEO; Steve Brenner, Senior VP Business Affairs & Operations; Barry Cook, VP Research; Douglas Hamilton, CFO & VP Adminstration; Douglas Holloway, VP Affiliate Relations; David Kenin, Senior VP Programming; John Silvestri, Senior VP Ad Sales; Andrew Besch, Senior VP Marketing; Ellen Kaye, VP Advertising & Promotions; Magie Hoehn, Manager, Sales Promotion; Elena Szucs, Manager, Consumer Promotion;
Regional Offices: Chicago: 401 N. Michigan Ave., Chicago, IL 60611 (312) 644-1522 Joseph Orso; Detroit: 2000 Town Center, Suite 2630, Southfield, MI 40875 (313) 353-1200 Steve Van Ophuijsen; Los Angeles: 1900 Ave. of the Stars, Los Angeles, CA 90067 (213) 277-0199.
Program Hours: 24 Hours
Program Format: Entertainment
Satellite: Galaxy I/21 & Satcom IIIR/10, VideoCipher encrypted
Subscriber Information: Affiliates: 10,100 as of 03/01/90; Subscribers: 51,900,000; Price, sub: .23
Advertising Per Hour: National-12 minutes/Local-2 minutes

VH-1/VIDEO HITS ONE
(212) 713-6481

1775 Broadway
New York, NY 10019
Parent Company: MTV Networks
Personnel: Ed Bennett, President; Juli Davidson, Senior VP Programming; Barry Kluger, VP Press Relations; Leslye Schaefer, VP Marketing & Promotions; Sam Moser, Director, Ad Sales, Eastern Region
Regional Offices: Western Region: 10 Universal City Plaza, 30th floor, Universal City, CA 91608 (818) 505-7800; Southeastern Region: 3399 Peachtree Road, Suite 900, North East, Atlanta, GA 30326, (404) 841-3099; Southwestern: 5000 Quorum, Suite 425, Dallas, TX 75240 (214) 404-0793; Central: 303 E. Wacker Drive, Suite 428, Chicago, IL 60601, (312) 565-2300; Detroit Ad Sales Office: 2301 W. Big Beaver Road, Suite 621, Troy, MI 48084, (313) 649-7170.
Program Hours: 24 Hours
Program Format: Video music, entertainment
Satellite: Galaxy III/15
Subscriber Information:
Affiliates: 3,505 as of 3/01/90; Subscribers: 35,300,000;
Advertising Per Hour: National-6 minutes/Local-2 minutes

VISION INTERFAITH SATELLITE NETWORK
(212) 602-0738

74 Trinity Place
Suite 800
New York, NY 10006
Parent Company: National Interfaith Cable Coalition
Personnel: Dr. Daniel Matthews, Chairman; Nelson Price, President & CEO; Jeff Weber, Executive VP Programming & Operations; William Airy, President VISN Group Inc.; Judy Wormington, Account Manager, East; Gary Clark, Account Manager, Central, West; Cynthia Smith, Marketing Manager
Regional Offices: VISN Group, Inc., 4643 South Ulster Street, Suite 600, Denver, CO 80237
Program Hours: 8:00 a.m.- 2:00 a.m. ET
Program Format: Faith and values-oriented programs
Satellite: Satcom IIIR/14
Subscriber Information:
Affiliates: 417 as of 4/01/90; Subscribers: 5,700,000; Price, sub:.03
Advertising Per Hour: National-6 minutes/Local-2 minutes

THE WEATHER CHANNEL
(404) 434-6800

2600 Cumberland Parkway
Atlanta, GA 30062
Parent Company: Landmark Communications Inc. Norfolk, VA
Personnel: Michael Eckert, President; Patrick Clark, Senior VP Administration & Finance; Stan Hunter, Senior VP Programming & Operations; Becky Ruthven, VP Affiliate Sales & Marketing; Donald Ershow, VP Advertising Sales; Frank Garland, West Central Division Advertising Sales Manager; Norman Zeller, East Central Division Advertising Sales Manager; Edward Byrnes, Eastern Division Advertising Sales Manager; Michael Lerner, Western Division Advertising Sales Manager; Tamra Zinn, Eastern Division Affiliate Sales & Marketing Director; Mary Hogan, Western Division Affiliate Sales & Marketing Director; Mimi Stamper, Affiliate Marketing Director
Regional Offices: 435 N. Michigan Avenue, 30th Floor, Chicago, IL 60611 (312) 644-0570, Frank Garland; 25689 Kelly Road, Roseville, MI 48066 (313) 777-0970, Norm Zeller; 1925 Century Park East, Suite 830, Los Angeles, CA 90067 (213) 785-0511, Mary Hogan; 780 Third Avenue, 23rd Floor, New York, NY 10017 (212) 308-3055, Edward Byrnes.
Program Hours: 24 Hours
Program Format: International, national, regional and local weather
Satellite: Galaxy III/13, VideoCipher encrypted
Subscriber Information:
Affiliateiates: 2,950 as of 3/1/90; Subscribers: 42,493,000;
Advertising Per Hour: National-9 minutes/Local-2 minutes

WGN/UNITED VIDEO
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Parent Company: United Video
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales; Reuben Gant, VP Corporate Accounts; Derk Tenzythoff Manager, Marketing; John Hawkins, Manager, Advertising & Promotions; Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations
Program Hours: 24 Hours
Program Format: Superstation with sports, movies, series, kids shows and specials.
Satellite: Galaxy I/3, VideoCipher encrypted
Subscriber Information:
Affiliateiates: 12,428 as of 12/31/89; Subscribers: 30,000,000; Price, sub:.10

WPIX/UNITED VIDEO
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Parent Company: United Video
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales; Reuben Gant, VP Corporate Accounts; Derk Tenzythoff, Manager, Marketing; John Hawkins, Manager, Advertising & Promotions;

Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations
Program Hours: 24 Hours
Program Format: Superstation sports, movies, kids shows, series and specials.
Satellite: Spacenet III/5, VideoCipher encrypted
Subscriber Information: Affiliateiates: 723 as of 12/31/89; Subscribers: 10,000,000; Price, sub:.10

WSBK-TV
(315) 455-5955

112 Northern Concourse
Syracuse, NY 13221
Personnel: Eastern Microwave
Personnel: Art Perkins, General Manager; Gil Korta, VP Video Programming; Laurie Silverman, Sales Manager
Program Hours: 24 Hours
Program Format: Superstation
Satellite: Spacenet 3/3, VideoCipher encrypted
Subscriber Information: Affiliates: 150 as of 1/1/90; Subscribers: 2,000,000; Price, sub:.10

WOR

WWOR-TV
(315) 455-5955

112 Northern Concourse
Syracuse, NY 13221
Parent Company: Eastern Microwave
Personnel: Art Perkins, General Manager; Gil Korta, VP Video Programming; Laurie Silverman, Sales Manager
Program Hours: 24 Hours
Program Format: Superstation
Satellite: Galaxy I/15, VideoCipher encrypted
Subscriber Information: Affiliates: 3,100 as of 1/1/90; Subscribers: 12,500,000; Price, sub: .10

PAY SERVICES

CINEMAX
(212) 512-1000

1100 Avenue of the Americas
New York, NY 10036
Parent Company: Home Box Office
Personnel: Michael Fuchs, Chairman & CEO; E. Thayer Bigelow, President; John Redpath, Senior VP General Counsel; Larry Carlson, Executive VP Affiliate Sales & Operations; Jeff Bewkes, Senior VP CFO; John Billock, Senior VP Marketing; Dan Levinson, VP Advertising & Consumer Promotion; Steve Janas, VP Direct Marketing; Cis Wilson; VP Original Programming; Barbara Jaffe, VP Sales, Promotion & Development
Regional Offices: Lenox Bldg. 3399 Peachtree Road NE, Suite 1600, Atlanta, GA 30326 (404) 239-6600, Gail Sermersheim; 6250 River Road, Suite 10-300, Rosemont, IL 60018 (708) 318-5100, Bruce Zeller; 12750 Merit Drive, Suite 1200, Dallas, TX 75251 (214) 450-1000, Jerry Flavin; The Quadrant, 5445 DTC Parkway, Suite 700, Englewood, CO 80111 (303) 220-2900, Jack Hayes; 6363 NW 6th Way, Suite 410, Ft. Lauderdale, FL 33309 (305) 491-0411, Jeff Krolik; 9401 Indian Creek Parkway, Suite 850, Overland Park, KS 66210 (913) 451-5100, Sharon Bennett; 2049 Century Park East, Suite 4100, Los Angeles, CA 90067 (213) 201-9200, Janice Aull; 1100 Avenue of the Americas, New York, NY 10036 (212) 512-1000, Peter Cohan; One Bala Cynwyd Plaza, Suite 440, 231 St. Asaphs Place, Bala Cynwyd, PA 19004 (215) 668-6500, Steve Davidson; Two Embarcadero Center, Suite 840, San Francisco, CA 94111 (415) 765-7700, Janet Long.
Program Hours: 24 Hours
Program Format: Theatrical movies each month plus original movie-based programs.
Satellite: Satcom IIIR/23; Galaxy I/19, VideoCipher encrypted
Subscriber Information: Affiliates: 5,200 as of 12/31/89; Subscribers: 6,400,000

The Disney Channel
America's Family Network™

THE DISNEY CHANNEL
(818) 569-7500

3800 W. Alameda Ave.
Burbank, CA 91505
Parent Company: Walt Disney
Personnel: John Cooke, President; Mark Handler, Senior VP Sales & Affiliate Marketing; Stephen Fields, Senior VP Original Programming; Bruce Rider, Senior VP Programming; Tom Wszalek, VP Consumer Marketing; Pat Lopker, VP Finance; Winnie Wechsler, VP Business Development; Charles Nooney, VP Affiliate Operations; George Leitman, VP New Markets
Program Hours: 24 Hours
Program Format: Family-oriented movies, series and specials
Satellite: Galaxy I/4, 24 VideoCipher encrypted
Subscriber Information: Affiliates: 6,100 as of 12/31/89; Subscribers: 5,003,000

HOME BOX OFFICE
(212) 512-1000

1100 Avenue of the Americas
New York, NY 10036
Parent Company: Time Warner Inc.
Personnel: Michael Fuchs, Chairman & CEO; E. Thayer Bigelow, President; John Redpath, Senior VP General Counsel; Larry Carlson, Executive VP Affilate Sales & Operations; Jeff Bewkes, Senior VP CFO; John Billock, Senior VP

Marketing; Bridget Potter, Senior VP Original Programming; Seth Abraham; Senior VP Programming Operations & Sports; Dan Levinson, VP Advertising & Consumer Promotion; Steve Janas, VP Direct Marketing; Barbara Jaffe, VP Sales, Promotion & Development
Regional Offices: Lenox Bldg. 3399 Peachtree Road NE, Suite 1600, Atlanta, GA 30326 (404) 239-6600, Gail Sermersheim; 6250 River Road, Suite 10-300, Rosemont, IL 60018 (708) 318-5100, Bruce Zeller; 12750 Merit Drive, Suite 1200, Dallas, TX 75251 (214) 450-1000, Jerry Flavin; The Quadrant, 5445 DTC Parkway, Suite 700, Englewood, CO 80111 (303) 220-2900, Jack Hayes; 6363 NW 6th Way, Suite 410, Ft. Lauderdale, FL 33309 (305) 491-0411, Jeff Krolik; 9401 Indian Creek Parkway, Suite 850, Overland Park, KS 66210 (913) 451-5100, Sharon Bennett; 2049 Century Park East, Suite 4100, Los Angeles, CA 90067 (213) 201-9200, Janice Aull; 1100 Avenue of the Americas, New York, NY 10036 (212) 512-1000, Peter Cohan; One Bala Cynwyd Plaza, Suite 440, 231 St. Asaphs Place, Bala Cynwyd, PA 19004 (215) 668-6500, Steve Davidson; Two Embarcadero Center, Suite 840, San Francisco, CA 94111 (415) 765-7700, Janet Long.
Program Hours: 24 Hours
Program Format: Theatrical movies, plus original motion pictures; music, comedy, original drama, documentary, series programming; sports.
Satellite: Satcom IIIR/13; Galaxy I/23, VideoCipher encrypted
Subscriber Information: Affiliates: 8,500 as of 12/31/89; Subscribers: 17,300,000

THE MOVIE CHANNEL

THE MOVIE CHANNEL
(212) 708-1797

1633 Broadway
New York, NY 10019
Parent Company: Showtime Networks
Personnel: Tony Cox, Chairman & CEO; Matt Blank, Executive VP Marketing; Jack Heim, Executive VP Sales & Affiliate Marketing; John Burns, Senior VP Sales & Field Operations; Steve Hewitt, Senior VP Original Programming & Production; Nora Ryan, Senior VP Consumer Marketing; Rick Howe, Senior VP Affiliate Marketing; Jim Miller, Senior VP Program Acquisition & Planning; Lori Ogden, VP Advertising & Promotion; Mark Greenberg VP Direct Marketing; Barbara Bellafiore, VP Sales Strategy
Regional Offices: Northcentral Region: 303 East Wacker Drive, Suite 2024, Chicago, Il 60601 (312) 993-0100, Raymond Boller, VP; South Central Region: 5000 Quorum Drive, Suite 455, Lock Box 59, Dallas, TX 75240 (214) 241-1421, Elaine Parris, VP; Western Region: 10 Universal City Plaza, Universal City, CA 91608 (818) 505-7700, Carol Mechanic, VP; Rocky Mountain Region: 8101 East Prentice Ave., Suite 704, Englewood, CO 80111 (303) 850-7380, Dick Ingebrand, Zone VP; South Eastern Region: 1040 Crown Pointe Parkway, Suite 850, Atlanta, GA 30338 (404) 396-1333; Northeast Region: 1211 Avenue of the Americas, New York, NY 10036 (212) 719-8900, Richard Maul, Regional VP
Program Hours: 24 Hours
Program Format: Movies
Satellite: Galaxy I/10,17; VideoCipher encrypted
Subscriber Information: Affiliates: 3,250 as of 4/1/90; Subscribers: 3,000,000

SHOWTIME.
IT PAYS TO BE DIFFERENT

SHOWTIME
(212) 708-1797

1633 Broadway
New York, NY 10019
Parent Company: Showtime Networks
Personnel: Tony Cox, Chairman & CEO; Matt Blank, Executive VP Marketing; Jack Heim, Executive VP Sales & Affiliate Marketing; John Burns, Senior VP Sales & Field Operations; Steve Hewitt, Senior VP Original Programming & Production; Nora Ryan, Senior VP Consumer Marketing; Jim Miller, Senior VP Program Acquisition & Planning; Lori Ogden, VP Advertising & Promotion; Mark Greenberg, VP Direct Marketing; Barbara Bellafiore, VP Sales Strategy
Regional Offices: Northcentral Region: 303 East Wacker Drive, Suite 2024, Chicago, Il 60601 (312) 993-0100, Raymond Boller, VP; South Central Region: 5000 Quorum Drive, Suite 455, Lock Box 59, Dallas, TX 75240 (214) 241-1421, Elaine Parris, VP; Western Region: 10 Universal City Plaza, Universal City, CA 91608 (818) 505-7700, Carol Mechanic, VP; Rocky Mountain Region: 8101 East Prentice Ave., Suite 704, Englewood, CO 80111 (303) 850-7380, Dick Ingebrand, Zone VP; South Eastern Region: 1040 Crown Pointe Parkway, Suite 850, Atlanta, GA 30338 (404) 396-1333; Northeast Region: 1211 Avenue of the Americas, New York, NY 10036 (212) 719-8900, Richard Maul, Regional VP.
Program Hours: 24 Hours
Program Format: Blockbuster movies, comedy series and specials, concerts, original movies and miniseries, championship boxing, family programs and classic films.
Satellite: Galaxy I/5,16
Subscriber Information: Affiliates: 6,000 as of 1/1/90; Subscribers: 7,300,000

PAY-PER-VIEW SERVICES

CABLE VIDEO STORE
(215) 956-6611

2200 Byberry Rd.
Hatboro, PA 19040
Parent Company: Jerrold Communications
Personnel: Hal Krisbergh, President-Jerrold Communications; Ken Nimmer, VP Programming; Jeremy Rosenberg, Director, Operations; Dana Ainsworth, Manager, Programming; Bonnie Bratby, Manager, Advertising & Promotions
Regional Offices: Dale Lister, Manager Affiliate Relations/Northern Region (215) 956-6614, Hatboro, PA; Jann Mellman, Manager Affiliate Relations, Southern Region (803) 795-4630, 113 Wappoo Creek Drive, #5, Charleston, SC 29412; Donna Stone, Manager Affiliate Relations, Western Region (303) 740-6118, 7100 E. Bellview, Suite 101, Englewood, CO 80111.
Program Hours: 24 Hours
Program Format: hit movies, special events, older film releases, children's favorites and lifestyle videos.
Satellite: Galaxy III/5, VideoCipher encrypted
Subscriber Information:
Affiliates: 150 as of 3/01/90;
Addressable Subscribers: 1,000,000;

DRIVE-IN CINEMA
(212) 941-1434

532 Broadway
6th Floor
New York, NY 10012
Parent Company: Graff Pay-Per-View
Personnel: Mark Graff, President; Leland Nolan, Executive VP; Nancy Anderson, Senior VP Programming & Operations; Steve Saril, VP Affiliate Sales & Marketing; Tina Clarke, Director, Public Relations; Victoria Salloum, Manager, Affiliate Sales & Relations;
Regional Offices: Stephen Porter, Director, Southeast Region: 4 Creekpark Court, Roswell, GA 30075 (404) 992-7824
Program Hours: 2:00 p.m. - 6:00 a.m. ET
Program Format: Action-adventure films and adult romances, plus specials
Satellite: Spacenet II/1, VideoCipher encrypted
Subscriber Information:
Affiliates: 10 as of 04/01/90;
Addressable Subscribers: 1,000,000

PLAYBOY
At Night

PLAYBOY AT NIGHT
(213) 659-4080

8560 Sunset Boulevard
Los Angeles, CA 90069
Parent Company: Playboy Video Enterprises
Personnel: Christie Hefner, Chairman, Playboy Enterprises; Robert Friedman, President, PVE; Richard Sowa, President; Michael K. Fleming, Senior VP GM; Allan Schwartz, Executive VP Programming; Steve Rechtschaffner, Senior VP; Larry Logan, VP Creative Services; Beverly Hutten, Manager, Creative Services; Jeff Ophime, Manager, Creative Services
Regional Offices: Michael Feinner; Regional VP Western Region; 8560 Sunset, LA 90069; (213) 659-4080; Jaime Fritz, Director, Sales & Affiliate Marketing; Tom Halsey; Director, Sales & Affiliate Marketing; 3473 Satellite Blvd. #200, Duluth, GA; Brian Quirk; Regional VP Eastern Region; 680 Lake Shore Dr., Chicago 60611; Don Starcke; Director, Sales & Affiliate Marketing; 8560 Sunset, LA (213) 659-4080 (312) 751-8000
Program Hours: 5:00 p.m. -3:00 a.m. PT weekdays; 8:00 p.m. - 6:00 a.m. PT weekends
Program Format: Adult entertainment, featuring original programs and features
Satellite: Satcom IV/24, scrambled
Subscriber Information:
Affiliates: 100 as of 4/1/90;
Addressable Subscribers: 3,000,000

RENDEZVOUS
(212) 941-1434

532 Broadway
6th Floor
New York, NY 10012
Parent Company: Graff Pay-Per-View
Personnel: Mark Graff, President; Leland Nolan, Executive VP; Nancy Anderson, Senior VP Programming & Operations; Steve Saril, VP Affiliate Sales & Marketing; Tina Clarke, Director, Public Relations; Victoria Salloum, Manager, Affiliate Sales & Relations
Regional Offices: Steve Porter, Director, Southeast Region, 4 Creekpark Court, Roswell, GA 30075 (404) 992-7824
Program Hours: 8:00 p.m. - 8:00 a.m. ET
Program Format: Adult entertainment movies and specials.
Satellite: Spacenet II/2, VideoCipher encrypted
Subscriber Information:
Affiliates: 20 as of 04/01/90;
Addressable Subscribers: 1,100,000;

REQUEST™
PAY PER VIEW

The Best in Movies, Sports and Specials

REQUEST TELEVISION
(212) 916-1041

685 Third Avenue
20th Floor
New York, NY 10017
Parent Company: Group W Satellite Communications/Reiss Media
Personnel: Jeffrey Reiss, Chairman, President & CEO; Lloyd Werner, President, Request TV; James Ganley, Executive VP & CFO, Reiss Media; Peter Brickman, VP Production, Operations & Engineering; Kathleen Canavan, VP Marketing GWSC; Mark Cutten, VP Programming & Studio Relations; Cheryl Daly, VP Public Relations

GWSC; Roy Mehlman, VP Affiliate Relations GWSC; Amelie Tseng, Manager, Public Relations; Barbara Piscitelli, Manager, Marketing
Program Hours: 24 hours
Program Format: Movies and special events.
Satellite: Satcom IIIR/19; Satcom F3R/24
Subscriber Information:
Affiliates: 342 as of 02/01/90; Addressable Subscribers: 5,900,000;

TUXXEDO NETWORK
(212) 696-1221

419 Park Avenue South 3rd Floor
New York, NY 10016
Personnel: Jeffrey Younger, President; Robert Kramer, CFO; Gibi Brown, Senior VP Sales & Affiliate Relations; Michael Kashmer, VP Sales & Affiliate Relations; John Amero, Director, Advertising & Promotions; Tom Russ, Director, Affiliate Marketing
Program Hours: 7:30 p.m.-6:30 a.m. ET
Program Format: Adult entertainment--movies and specials
Satellite: Galaxy II/4
Subscriber Information:
Affiliates: 55 as of 4/1/90; Addressable Subscribers: 1,500,000

VIEWER'S CHOICE
(212) 468-6600

909 Third Ave.
21st Floor
New York, NY 10022
Parent Company: Pay Per View Network Inc.
Personnel: James Heyworth, President & CEO; J. Robert Bedell, Senior VP Sales & Marketing; James English, Senior VP Programming; Hilda Chazanovitz, VP Marketing; Sandra Landau, VP General Counsel; Hilda Chazanovitz, VP Marketing;
Regional Offices: 1888 Century Park East, Suite 830, Century City, CA 90067 (213) 785-9094, Mark Landon, Director, Affiliate Relations.
Program Hours: 24 hours
Program Format: Films, sports and entertainment events.
Satellite: Galaxy III/16, 21, VideoCipher encrypted
Subscriber Information:
Affiliates: 300 as of 04/01/90; Addressable Subscribers: 6,300,000;

HOTEL PAY-PER-VIEW SERVICES

COMSAT VIDEO ENTERPRISES
(301) 428-4000

2230 Comsat Drive
Clarksburg, MD 20871
Parent Company: Comsat
Personnel: Robert Wussler, President & CEO; Char Beales, VP Program Development; Daniel Thomas, VP Finance & Adminstration; John Schmuhl, VP & General Manager; Al Norcott, VP Broadcast Operations; Michael Klein, VP Programming; Frank Famariss, VP Sales & Marketing; Arthur Sando, VP Marketing & Communications; Patrick Bohana, Director, Cable Ventures; Alison Curtis, Director, Marketing; Marty Diller, National Account Manager, Northeast; Wes Cowley, National Account Manager, Southeast; James Wilbourn, National Account Manager, South Central; Lynn Rader, National Account Manager, Far West; Debra Schlundt, Manager, Affiliate Relations
Regional Offices: Northeast: Marty Diller: 1240 Victoria Lane, West Chester, PA 19380, 215-431-1936; Southeast: Wes Cowley: 625 Hawthorne Trail, Lakeland, FL 33803, 813-688-8410; So. Central: James Wilburn: 3335 Timmons Lane #140, Houston, TX 77027, 713 621 5259; Far West: Lynn Rader: 11548 Windcreast Lane #232, San Diego, CA 92128, 619-673-2260
Program Hours: 1 a.m.-6 a.m. ET
Program Format: Feature films
Satellite: SBS III, VideoCipher encrypted
Subscriber Information:
Affiliates: 1,700 as of 01/01/90; Subscribers: 310,000

GUEST CINEMA
(212) 984-5900

1 Dag Hammarskjold Plaza
New York, NY 10017
Parent Company: Reiss Media Enterprises
Personnel: Jeffrey Reiss, Chairman, President and CEO; James Ganley, Executive VP CFO; Peter Brickman, VP General Manager, Guest Cinema; Mark Cutten, VP Programming & Studio Relations; Ron Midili, Manager, Programming; Jan Teich, Director, Marketing and Public Relations; Lisa Gage, Manager, Marketing; Louise Fickens, Trade Marketing Coordinator; Dominic Cioffi, Financial Analyst
Program Hours: 22 Hours
Program Format: Two movie channels running 12 titles per month
Satellite: Satcom IV/14,18; Scrambled
Subscriber Information:
Affiliates: 250 hotels as of 4/1/90; Hotel Rooms: 55,000

AUDIO SERVICES

AEI MUSIC NETWORK
(919) 783-0391

3717 National Drive
Suite 109
Raleigh, NC 27612
Personnel: Michael Malone, President; Bonnie Sullivan, National Sales Manager/Special Events
Program Hours: 24 hours
Program Format: Four different formats-LIFESTYLE: Contemporary instrumental. STARTRACKS: Pop hits CLASSICAL: Popular light classical music DEBUT: original artist chart hits.
Satellite: Satcom K2/12; Galaxy I/3
Subscriber Information:

Affiliates: 160 as of 03/31/90; Subscribers: 5,000,000; Price/sub: .01

C-SPAN AUDIO NETWORK I/II
(202) 737-3220

400 North Capitol St. NW
Suite 650
Washington, DC 20001

Personnel: Brian Lamb, President and COO; Susan Swain, Senior VP; Rob Kennedy, Senior VP; Mike Michaelson, Executive VP; Beth Glass, Audio Services Manager; Lisa Kerr, Manager, Affiliate Relations; Peter Kiley, Supervisor, Affiliate Relations; Pat Daniel, Supervisor, Marketing; Cynthia Dinkins-Lassiter, Marketing Representative, Special Projects; Barkley Kern, Marketing Representative, Western Region; Charlotte Bowers, Marketing Representative, Southeast Region; Kate Mills, Marketing Representative, MidAtlantic Region
Program Hours: 24 hours
Program Format: Public affairs
Satellite: Galaxy III/24
Subscriber Information:
Affiliates: 8 (Audio I), 4 (Audio II) as of 01/01/90; Subscribers: 548,100 (Audio I), 440,700 (Audio II); Price/sub: .04

CABLE RADIO NETWORK
(818) 352-7152

10487 Sunland Blvd.
Sunland, CA 91040

Personnel: Michael Horn, President; Melody Kishimoto, Business Manager; Robert Lane, Production Engineer; Susan Watters, Affiliate Represcntive
Regional Offices:
United Video, Tulsa, OK
Program Hours: 24 Hours
Program Format: Adult contemporary
Satellite: Satcom IIIR/11
Subscriber Information:
Affiliates: 65 as of 03/01/90; Subscribers: 2,311,692

GALACTIC RADIO
(303) 792-3111

9697 E. Mineral Ave.
Englewood, CO 80112

Parent Company: Jones International
Personnel: Glenn Jones, Chairman & CEO; Gregory Liptak, Group President; Jeffrey Hansen, General Manager; Dale Ogden, Operations & Program Manager; Gwenael Hagan, Director, Concept Integration; Adrienne Thiele, Manager of Product Marketing; Cindy Eichner, Affiliate Sales Manager, West; Chery Eichner, Affiliate Sales Manager, East; Sharon Sall, Affiliate Relation Coorinator; Andrea Montoni, Public Relations Manager
Program Hours: 24 Hours
Program Format: 6 music formats: classical, new age jazz, country, adult contemporary, classic rock, easy listening; 4 news/sports/talk radio superstations; In-Touch Network (reading service for the visually-impaired).
Satellite: Galaxy III/11
Subscriber Information:
Affiliates: 165 as of 03/01/90; Subscribers: 4,500,000; Price/sub: .01 to .09

KKJZ/UNITED VIDEO
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145

Parent Company: United Video Inc.
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales; Reuben Gant, VP Corporate Accounts; Derk Tenzythoff, Manager, Marketing; John Hawkins, Manager, Advertising & Promotions; Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations
Program Hours: 24 hours
Program Format: Jazz
Satellite: Spacenet III/8
Subscriber Information:
Affiliates: 20 as of 12/31/89; Subscribers: 249,804; Price/sub: .02

MOODY BROADCASTING NETWORK
(312) 329-4433

820 North LaSalle Drive
Chicago, IL 60610

Parent Company: Moody Bible Institute of Chicago
Personnel: Joseph Stowell III, President; Robert Neff, VP Broadcasting; Wayne Shepherd, Manager, Programming Division; Robert West, Director, Network Development; David Woodworth, Administrator, Affiliate Development; Becky Horne, Network Representative; Daniel Deal, Network Representative; Robert Butts, Network Representative
Program Hours: 24 hours
Program Format: Christian stereo audio; MOR, variety.
Satellite: Spacenet III/13; Aurora I/10
Subscriber Information:
Affiliates: 50 as of 02/28/90; Subscribers: 723,731

TEMPO
(212) 983-3300

342 Madison Avenue
Suite 505
New York, NY 10173

Parent Company: International Cablecasting Technologies
Personnel: Jerold Rubinstein, Chairman; W. Thomas Oliver, President; Molly Seagrave, VP Communications; John Flannery, Director, Affiliate Sales & Marketing; Mike Davis, Network Operations
Program Hours: 24 hours
Program Format: 6 channels of music plus In-Touch Network
Satellite: Satcom IV/19
Subscriber Information:
Affiliates: 100 as of 04/01/89; Subscribers: 1,000,000; Price/sub: .03

WFMT/UNITED VIDEO
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Parent Company: United Video Inc.
Personnel: Jeff Treeman, Senior VP; Anne Wilkerson, VP Cable Sales: Reuben Gant, VP Corporate Accounts; Derk Tenzythoff, Manager, Marketing; John Hawkins, Manager, Advertising & Promotions; Janice Ruh, Manager, Marketing Information; Ira Apt, Director, Operations
Program Hours: 24 hours
Program Format: Classical music
Satellite: Galaxy I/3
Subscriber Information: Affiliates: 165 as of 12/31/89; Subscribers: 1,453,861; Price/sub: .02

TEXT SERVICES

AP BUSINESS/NEWS/SPORTS PLUS
(202) 955-7200

1825 K. Street, NW
Washington, DC 20006
Parent Company: Associated Press/ Tribune Media Services
Personnel: Greg Groce, Director, Cable TV; Bob Reed, President, Plus; Mike Argirion, VP, Plus
Regional Offices: Tribute Media Services, 64 East Concord Street, Orlando, FL 32801, (407) 839-5600
Program Hours: 24 Hours
Program Format: Updated 30-minute information cycles
Satellite: Spacenet III/4
Subscriber Information: Affiliates: 200 as of 4/1/90; Subscribers: 4,700,000; Price/sub: varies with size of system
Advertising Per Hour: National-6 minutes/Local-2 minutes

CABLE SPORTSTRACKER
(918) 665-6690

3801 South Sheridan
Tulsa, OK 74145
Parent Company: Prevue Networks Inc.
Personnel: Joe Batson, VP Chief Operating Officer; Wm. Chris Bourne, VP Marketing/Operations; Mary Prodger, VP Programming/ Production; Donna Davis, Director, Affiliate Sales; Elaine Estes, Director, National Accounts
Program Hours: 24 Hours
Program Format: Alphanumeric service offering sports scores, news and schedules
Satellite: Galaxy I/3
Subscriber Information: Affiliates: 42 as of 02/28/90; Subscribers: 1,249,484

EPG/ELECTRONIC PROGRAM GUIDE
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Personnel: Joe Batson, VP Chief Operating Officer; Wm. Chris Bourne, VP Marketing/Operations; Mary Prodger, VP Programming/ Production; Donna Davis, Director, Affiliate Sales; Elaine Estes, Director, National Accounts
Program Hours: 24 Hours
Program Format: On-screen program guide, customized by system and updated daily
Satellite: Galaxy I/3
Subscriber Information: Affiliates: 123 as of 02/28/90; Subscribers: 4,513,707
Advertising Per Hour: National-N.A./Local-3 Minutes

EPG JR.
(918) 665-6690

3801 S. Sheridan
Tulsa, OK 74145
Parent Company: Prevue Networks Inc..
Personnel: Joe Batson, VP Chief Operating Officer; Wm. Chris Bourne, VP Marketing/Operations; Mary Prodger, VP Programming/ Production; Donna Davis, Director, Affiliate Sales; Elaine Estes, Director, National Accounts
Program Hours: 24 Hours
Program Format: On-screen program guide for up to 21 channels
Satellite: Galaxy I/3
Subscriber Information: Affiliates: 376 as of 02/28/90; Subscribers: 420,381

STORY VISION NETWORK (formerly known as GENESIS STORYTIME) (204) 942-1005

1400-19 Lombard Avenue
Winnipeg, Manitoba, R3B 0X1
Personnel: Helmut Sass, President; Bob Nyhoff, Sales Manager
Program Hours: 24 hours
Program Format: Children/ Family tales and features
Satellite: Satcom IIIR/3 VideoCipher encrypted
Subscriber Information: Affiliates: 40 as of 09/01/89; Subscribers: 2,100,000

COMPUTER SERVICES

FNN MARKETWATCH
(703) 790-3570

8300 Old Courthouse Rd. Suite 200
Vienna, VA 22182
Parent Company: Financial News Network (Data Broadcasting Corp. division)
Personnel: Ed Happ, General Manager; Ed Anderson, Senior VP Marketing/Sales; Fred McEnony, Sales Manager
Program Hours: 24 Hours
Program Format: Business information and stock quotes
Satellite: Satcom IIIR/22
Subscriber Information: Affiliates: 900 as of 03/23/90; Subscribers: 4,000; Price/sub: $110.

X*PRESS INFORMATION SERVICES

(303) 721-1062

Regency Plaza One/4643 S Ulster
Suite 340
Denver, CO 80237

Parent Company: Tele-Communications Inc.
Personnel: Gerald Bennington, President; George Backer, VP Technical; Gary Clark, VP Affiliate Relations; Judy Spurgeon, VP Customer Sales & Support; Tomec Smith, VP Marketing
Program Hours: 24 Hours
Program Format: News, information features and children's material
Satellite: Galaxy I/7,18 VideoCipher encrypted
Subscriber Information: Affiliates: 550 as of 01/01/90; Subscribers: N.A.

INTERACTIVE SERVICES

VIDEO JUKEBOX NETWORK

(305) 573-6122

3550 Biscayne Blvd.
Miami, FL 33137

Parent Company: Video Jukebox Network Inc.
Personnel: David Unger, Chairman; Andrew Orgel, President/CEO; Jose Felipe VP Finance & Administration; Cheryl Greene, VP Affiliate Sales & Marketing; Les Garland, VP Programming; John Robson, Director Corporate Communications & Production; Mark Petronaci, Director, New Product Development; Ashley Stoken, Manager, Promotions; Steve Williams, Director New Business Development;
Regional Offices: Davida Shear, East Coast Affiliate Sales, 175 West 79th Street, New York, NY 10024 (212) 873-9300; Shirley Rohn-Saito, West Coast Affiliate Sales, 3170 West Sierra Drive, Westlake, CA 91362 (805) 379-2557.
Program Hours: 24 Hours
Program Format: Music videos using a viewer programmed interactive system.
Subscriber Information: Affiliates: 50 as of 04/01/90; Subscribers: 6,600,000; Advertising Per Hour: National-none/Local-N.A.

CROSS-CHANNEL PROMOTION SERVICES

NUSTAR

(215) 692-5900

1332 Enterprise Drive
West Chester, PA 19380

Parent Company: The Lenfest Group
Personnel: Wayne Bullock, President; William Baker, VP Affiliate Sales; Peter Mondics, VP Network Sales; Doug Dexter, VP Operations
Regional Offices: Central-Lisa Schwartz (215) 692-5900; Northeast-Rich Millar (215) 692-5900; Southeast-Bob Mason (404) 279-8688; West-Nancy Sill (415) 837-7144.
Program Hours: 7:00 AM - 2:00 AM ET
Program Format: Cross-channel promotion service.
Satellite: Galaxy III/12
Subscriber Information: Affiliates: 351 as of 03/12/90; Subscribers: 10,097,742

PRIME TIME TONIGHT

(404) 434-6800

2600 Cumberland Parkway
Atlanta, GA 30339

Parent Company: Cable Video Entertainment/Landmark Communications/Tele-Communications Inc.
Personnel: Michael Eckert, President; Becky Ruthven, VP Affiliate Sales & Marketing; Mimi Stamper, Affiliate Marketing Director; Tamra Zinn, Eastern Division Director; Joe Pfifer, Affiliate Sales Manager; Kathy Lane, Public Relations Manager
Regional Offices: 1925 Century Park East, Suite 830, Los Angeles, CA 90067 (213) 785-0511, Mary Hogan, Western Division Director.
Program Hours: :27 and :57 past the hour, starting at 6:57 through 10:27 ET
Program Format: System-specific program promotion service.
Satellite: Galaxy III/13, VideoCipher encrypted
Subscriber Information: Affiliates: 400 as of 01/01/90; Subscribers: 7,200,000; Price, sub: .0133

SHOPPING SERVICES

HOME SHOPPING NETWORK I/II

(813) 572-8585

PO Box 9090
Clearwater, FL 34618-9090

Parent Company: Home Shopping Network
Personnel: Roy Speer, Chairman and CEO; Lowell Paxson, President; Nando DiFilippo, Executive VP, General Counsel & Secretary; Les Wandler, CFO & Treasurer; J. Michael Reardon, Executive VP Operations; Scott Campbell, Senior VP, Cable Affiliates; William Doten, VP Corporate Marketing
Program Hours: 24 hours
Satellite: Galaxy III/8
Subscriber Information: Affiliates: 1,500 (HSN I), 400 (HSN II) as of 4/1/90; Subscribers: 17,000,000 (HSN I) 7,000,000 (HSN II)

JCPenney
TELEVISION
SHOPPING
CHANNEL

J.C. PENNEY TV SHOPPING CHANNEL
(214) 591-3948

One Lincoln Center
5430 LBJ Freeway
Dallas, TX 75240
Parent Company: J.C. Penney Co.
Personnel: B.D. Langford, President; Gary Watkinson, Sales & Marketing Manager; Al Bell, Director, Merchandising; Enid Stepner, Public Relations Manager
Regional Offices: 5842 Sunset Blvd., Bldg. 11 2nd Floor, Hollywood, CA 90028, Dean Thomas, VP Sales & Marketing Western Region; 501 Archdale Drive, Suite 127, Charlotte, NC 28210, Jackie Bradley, VP Sales Eastern Region.
Program Hours: 24 hours
Satellite: Satcom IIIR/8
Subscriber Information:
Affiliates: 900 as of 04/01/90; Subscribers: 13,000,000

QVC®
NETWORK

QVC NETWORK
(215) 430-1000

1365 Enterprise Drive
West Chester, PA 19380
Personnel: Joesph Segel, Chairman & CEO; Michael Boyd, President & COO; Bruce Sellers, Executive VP, Affiliate Relations; Douglas Briggs, Executive VP, Programming; Ronald Giles, Executive VP, Broadcasting; Keith Halford, Executive VP New Business; William Costello, Executive VP, CFO; Gary Ozaroff, Executive VP Merchandising; George Nice, VP Marketing Services; MaryBeth Alvin, Director, Public Relations
Regional Offices: Peter Flint, VP Affiliate Relations Eastern Region; 1366 Enterprise Dr. West Chester PA 19380, (215) 430-1028; Chuck Price, VP Affiliate Relations Western Division; 8101 East Prentice, Suite 610, Englewood, CO 80111 (303) 721-7718
Program Hours: 24 Hours
Program Format: Theme hours
Satellite Offices: Galaxy III/9
Subscriber Information:
Affiliates: 3,000 as of 03/30/90; Subscribers: 35,000,000

REGIONAL BASIC SPORTS SERVICES

ARIZONA SPORTS PROGRAMMING NETWORK
(602) 866-0072

17602 N. Black Canyon Highway
Phoenix, AZ 85023
Parent Company: Times Mirror Cable TV
Personnel: Suzee Smith-Everhard, Director, Programming; George Allen, Sports Coordinator; John Lunning, Production Manager; Steve Rizley, General Sales Manager, Advertising; Paul Gregg, VP Marketing
Program Hours: 4:00 p.m. - 2:00 a.m. PT (End time varies due to events.)
Subscriber Information:
Affiliates: N.A.; Subscribers: 308,000
Advertising Per Hour: Regional-N.A./Local-2 minutes

KBL SPORTS NETWORK
(412) 381-9500

Trimont Towers
1305 Grandview Ave.
Pittsburgh, PA 15211
Parent Company: Tele-Communications Inc.
Personnel: Gilbert Lucas, General Manager/Executive Producer; Melissa McKee, Sports Program Coordinator; Jay Knafel, Affiliate Relations Manager; Tom Pendergast, Operations Manager; William Hartman, Advertising Sales; Anita Forman, Sales Coordinator
Program Hours: 5:00 p.m. - 1:00 a.m. ET weekdays; noon-midnight ET weekends
Satellite: Spacenet II/19, VideoCipher encrypted
Subscriber Information:
Affiliates: 20 as of 03/25/90; Subscribers: 1,200,000
Advertising Per Hour: Regional-N.A./Local-2 minutes

MADISON SQUARE GARDEN NETWORK
(212) 563-8000

Two Pennsylvania Plaza
New York, NY 10121
Parent Company: Paramount Communications
Personnel: Robert Gutkowski, Executive VP, MSG Communications Group; Sid Amira, VP Affiliate Affairs; Lee Berke, VP Marketing; Martin Brooks, VP Programming & Network Operations; Douglas Moss, VP Advertising Sales; Pete Silverman, VP/Executive Producer; Paul Schneider, Director, Public Relations; Ron Speck, General Sales Manager; Andrea Poch-Freer, National Sales Manager; Jane DiBlasio, Marketing Communications Manager
Program Hours: 7:00 p.m.-1:00 a.m. ET weekdays; extended on weekends
Program Format: New York Knicks basketball, Rangers hockey, Yankees baseball, boxing, college sports, tennis, wrestling, and other events
Satellite: Satcom IV/6
Subscriber Information:
Affiliates: 172 as of 02/01/90; Subscribers: 3,600,000
Advertising Per Hour:N.A.

MEADOWS RACING NETWORK
(412) 225-9300

PO Box 499
Race Track Road
Meadow Lands, PA 15347
Parent Company: LadGrove At The Meadows
Personnel: John Swiatek, General Manager; Randy Edmonds, Operations Manager; Dennis Facren, Comptroller; Tom Chaffee, Marketing Director; Bob Sabot, Publicity Director; Chris Blaine, Promotions
Type Of Service: Regional Sports
Program Hours: 7:00 p.m.-11:30p.m. ET Thursday-Saturday; 6:30 p.m.-11:00p.m. ET Sundays
Program Format: Harness racing
Satellite: Galaxy II/16, VideoCipher encrypted
Subscriber Information: Affiliates: 17 as of 03/11/90; Subscribers: 700,000
Advertising Per Hour: Regional-N.A./Local-1 minute

NIAGARA FRONTIER SPORTS NETWORK
(716) 856-7300

Memorial Auditorium
140 Main St.
Buffalo, NY 14202
Parent Company: Buffalo Sabres/Adelphia Communications
Personnel: Don Angelo, Director, Sales & Marketing
Program Hours:various
Program Format: NHL Buffalo Sabres Hockey
Satellite: Spacenet III/18
Subscriber Information: Affiliates: 13 as of 4/1/90 Subscribers: 722,650
Advertising Per Game:24 minutes

PACIFIC SPORTS NETWORK
(415) 463-1525

5924 Stoneridge Drive
Pleasanton, CA 94566-0811
Parent Company: Tele-Communications Inc./Viacom
Personnel: Kevin Mulligan, General Manager; Sandra Eddy, Director, Sales & Marketing; Jim Risinger, Senior Producer; Steve Gallagher, Chief Accountant; Mary Tavormina, Marketing Coordinator; Matt Cullen, Associate Producer
Program Hours:4:00 p.m. to midnight PT weekdays; 11:00 a.m. to midnight PT weekends

PRIME SPORTS NETWORK MIDWEST/UPPER MIDWEST
(303) 355-7777

250 Steele Street
Suite #300
Denver, CO 80206
Parent Company: Prime Network
Personnel: Bob Thompson, VP General Manager; Gretchen Bunn, Director, Affiliate Sales & Marketing; Chris Bryan, Director, Promotions
Program Hours: 11:00 a.m. - 6:00 a.m. ET
Satellite: Satcom I-R/24
Subscriber Information:N.A.
Advertising Per Hour: Regional-N.A./Local-2 minutes

PRIME SPORTS NORTHWEST

PRIME SPORTS NORTHWEST
(206) 281-7800

18 West Mercer
Seattle, WA 98119
Parent Company: Tele-Communications Inc./Viacom
Personnel: Clayton Packard, General Manager; Curtis Smith, Director, Marketing & Affiliate Relations; Theresa Cuthill, Director, Programming; Carl Malone, Production Manager; Mark Jorgensen, Advertising Sales Manager
Program Hours: 4:00 p.m. - 1:00 a.m. PT weekdays; 2:00 p.m. - 1:00 a.m. weekends
Program Format: Seattle Supersonics basketball, WHC Hockey, horse racing, Seattle Storm soccer, plus Pac 10 football and basketball
Subscriber Information: Affiliates: 65 as of 04/15/90; Subscribers: 1,100,000; Price/sub: varies .10 - .35
Advertising Per Hour: Regional-N.A./Local-2 minutes

PRIME SPORTS NETWORK/ ROCKY MOUNTAIN
(303) 355-7777

250 Steele St.
Suite 300
Denver, CO 80206
Personnel: Bob Thompson, VP General Manager; Gretchen Bunn, Director, Affiliate Sales & Marketing; Chris Bryan, Director, Promotions
Program Hours: 11:00 a.m. - 6:00 a.m. ET
Satellite: Satcom I-R/24
Subscriber Information: Affiliates: N.A. as of 4/1/90; Subscribers: 700,000; Price/sub: varies
Advertising Per Hour: Regional-N.A./Local-2 minutes

PRIME SPORTS NETWORK/ UTAH
(801) 265-8777

4424 South 700 East
Suite 210
Murray, UT 84107
Personnel: Bob Thompson, VP General Manager; Tom Bork, Director, Affiliate Sales & Marketing; Chris Bryan, Director, Promotions
Program Hours: 11:00 a.m. - 6:00 a.m. ET
Satellite: Satcom I-R/24
Subscriber Information: Affiliates: 26 as of 4/5/90; Subscribers: 290,000; Price/sub: varies
Advertising Per Hour: Regional-N.A./Local-2 minutes

PRIME TICKET NETWORK

(213) 556-7500

10000 Santa Monica Blvd.
Los Angeles, CA 90067
Parent Company: Prime Network
Personnel: John Severino, President & CEO; Don Corsini, VP Programming & Production; Mike Kincaid, VP Advertising Sales; Tim Krauss, VP Marketing & Affiliate Relations; Bob Billeci, VP Engineering; Robert Gold, VP Public Relations; Kathryn Gregoryk, VP Finance
Program Hours: 5:00 p.m.-2:15 a.m. PT weekdays; 11:00 a.m.-2:15 a.m. PT weekends
Satellite: Satcom IR/7, VideoCipher encrypted
Subscriber Information: Affiliates: 166 as of 04/01/90; Subscribers: 4,000,000
Advertising Per Hour: N.A.

SPORTSCHANNEL BAY AREA

(415) 296-8900

901 Battery Street, Suite 204
San Francisco, CA 94111
Parent Company: SportsChannel
Personnel: John McCasey, Executive Producer/Director of Operations; Chris Geer, Director, Affiliate Sales; Eva Bustos, Manager, Marketing & Public Relations
Program Hours: 4:00 p.m.-midnight PT weekdays; 9:00 a.m.-midnight PT weekends
Satellite: Westar V/15
Subscriber Information: N.A. (launched 4/4/90)
Advertising Per Hour: Regional-8 Minutes/Local-2 Minutes

SPORTSCHANNEL CHICAGO

(708) 524-9444

820 West Madison
Oak Park, IL 60302
Parent Company: SportsChannel
Personnel: Jim Corvo, Vice President/General Manager; John Tuohey, Director, Operations; Steve Corman, Executive Producer; Cindy Stanley, Business Operations Manager; Kelly Sullivan, Creative Services Manager; Lori Cohen, Director, Affiliate Sales; Julie Johnson, Affiliate Sales Manager; John Hokin, Director, Advertising Sales
Regional Offices: RASCO: 625 N. Michigan Avenue, Suite 500, Chicago, IL 60611, Dave Tipton, Advertising Sales, Bob Saalfield, Advertising Sales.
Program Hours: 4:00 p.m. - 2:00 a.m. weekdays; 6:00 a.m. - 2:00 a.m. CT weekends
Satellite: Satcom IV/9, VideoCipher encrypted
Subscriber Information: Affiliates: 70 as of 02/01/90; Subscribers: 1,600,000
Advertising Per Hour: N.A.

SPORTSCHANNEL CINCINNATI

One Centennial Plaza
705 Central Avenue Suite 300
Cincinnati. OH 45202
Parent Company: SportsChannel
Personnel: James Corvo, VP Midwest Region; Ken Kolb, Director, Programming & Operations; Lori Cohen, Director, Affiliate Sales Midwest Region
Program Hours: 5:00 p.m.-1:00 a.m. CT weekdays; 10:00 a.m.-1:00 a.m. CT weekends
Satellite: Satcom IV/1
Subscriber Information: Affiliates: 2 as of 4/1/90; Subscribers: 70,000
Advertising Per Hour: N.A.

SPORTSCHANNEL OHIO

(216) 328-0333

6500 Rockside Rd., Suite 340
Independence, OH 44131
Parent Company: SportsChannel
Personnel: Bill Craig, VP & General Manager; John Scaro, Affiliate Sales Director; Joe Tanzarello, Director, Programming & Network Operations; Mike Dolan, Manager, Marketing & Public Relations; John Guming, Affiliate Marketing Manager; Joe Mancusco, Advertising Sales Manager
Program Hours: 5:30 p.m.-2:00 a.m. CT weekdays; 9:30 a.m.-2:00 a.m. CT weekends
Satellite: Satcom IV/16, Scrambled
Subscriber Information: Affiliates: 14 as of 3/30/90; Subscribers: 600,000
Advertising Per Hour: Regional-N.A./Local-2 minutes

SPORTSCHANNEL PHILADELPHIA

(215) 668-2210

225 City Avenue
Bala Cynwyd, PA 19004
Personnel: Donald Heller, VP General Manager; Sam Schroeder, VP Assistant General Manager; Daniel Ronayne, Director, Marketing; Lynn Lonker, Director, Programming; Jim Barniak, Sports Director,; Daniel Ronayne, Director, Marketing; Jeanne Gengler, Affiliate Marketing Manager; Sally Leifer, Marketing Affiliate Representative; Lisa Stuchell, Marketing Coordinator; Suzanne Rioux, Advertising & Promotions Coordinator; Jacqueline Sandherr, Advertising Sales Representative
Program Hours: 6:00 p.m. - 2:00 a.m. ET weekdays; 10:00 a.m. -2:00 a.m. ET weekends
Satellite: Satcom IV/10
Subscriber Information: Affiliates: 6 as of 02/01/90; Subscribers: 365,000; Price/sub: .25
Advertising Per Hour: Regional-N.A./Local-2 minutes

SUNSHINE NETWORK
(407) 648-1150

390 N. Orange Ave.
Suite 275
Orlando, FL 32801

Parent Company: Affiliated Regional Communications
Personnel: Dave Almstead, VP President & General Manager; Patricia Bishop, Director, Marketing; Tom Comerford, Director, Sales; Steve Hull, Director, Public Affairs; Amy Pempel, Manager, Media Relations; Cheri Jacobs, National Sales Manager; Dana Stites, Programming Manager; Steven Kip, Advertising Account Executive; Regina Maher, Advertising Account Executive; Ann Kennedy, Advertising Account Executive; Cathy Weeden, Marketing/Affiliate Relations Manager
Regional Offices: Group W Sports Marketing; 90 Park Ave., 17th Floor; New York, NY 10016; Scott Conant, Eastern Marketing Manager
Program Hours: 5 p.m. to 2 a.m. ET weekdays/9 a.m. to 2 a.m. ET weekends
Program Format: Sports and state/national public affairs programming
Satellite: Satcom IR/11, VideoCipher encrypted
Subscriber Information: Affiliates: 145 as of 03/15/90; Subscribers: 2,800,000
Advertising Per Hour:N.A.

REGIONAL PAY SPORTS SERVICES

HOME SPORTS ENTERTAINMENT
(214) 401-0099

600 East Las Colinas
Suite 2200
Irving, TX 75039

Parent Company: Sportscom
Personnel: Ed Frazier, CEO; Joe King, Senior VP Network Operations; Jack Stanfield, VP Programming; John McIntyre, VP Facilities; Jay Finegold, VP Special Projects; Lynn Geick, VP Finance; Sherry Adams, National Sales Manager; Ted Rudolph, Director, Advertising Sales; Jon Heidtke, Director, Affiliate Sales/Marketing; Terry Chili, Senior Manager Affiliate Sales/Marketing; Joe Gagliardi, Director, Commercial Sales; Cindy Harrington, Director, Marketing
Program Hours: 4:00 p.m.- 2:00 a.m. CT weekdays; 10:00 a.m. -2:00 a.m. CT weekends
Satellite: Satcom IR/10, VideoCipher encrypted
Subscriber Information: Affiliates: 462 as of 02/01/90; Subscribers: 1,700,000
Advertising Per Hour: Regional-N.A./Local-2 minutes

HOME TEAM SPORTS
(202) 728-5300

1111 18th St. NW
Suite 200
Washington, DC 20036

Parent Company: Group W Satellite Communications
Personnel: Bill Aber, VP/ General Manager; Jody Shapiro, Director, Programming/Executive Producer; Darrell Landrum, Director, Operations/Assistant Director, Programming; Joe King, Director, Engineering; Dave Zahra, Controller; Bill Brown, Director, Production; Michael Ortman, Director, Marketing; Jeffrey Wagner, General Sales Manager; Jon Cherney, National Sales Manager; Bob Bradley, Affiliate Marketing Manager; Scott Broyles, Communications Manager; Bob Storin, Promotions Manager; Mike Krasney, Baltimore/Washington Sales Manager
Program Hours:5:00 p.m. to 2:00 a.m. ET weekdays: 9:00 a.m. to 2:00 a.m. ET weekends
Program Format: More than 500 events, including 90 Baltimore Orioles baseball games, 35 Washington Capitals hockey games & 30 Washington Bullets basketball games.
Satellite: Spacenet III/12, VideoCipher encrypted
Subscriber Information: Affiliates: 181 as of 03/01/90; Subscribers: 1,500,000
Advertising Per Hour:N.A.

NEW ENGLAND SPORTS NETWORK
(617) 536-9233

70 Brookline Avenue
Fenway Park
Boston, MA 02215

Parent Company: Boston Red Sox, Boston Bruins & WSBK
Personnel: John Claiborne III, VP General Manager; Jerry McAuliffe, Director, Advertising Sales; Sean McGrail, Director, Marketing; Donald Reilly, Director, Business Affairs; John Slattery Jr., Director,ector of Advertising/Promotion; Robert Whitelaw, Director, Operations; David Daniels, Affiliate Representative; John O'Leary, Account Executive; Peter Plaehn, Advertising/Public Relations Coordinator; Christopher Swan, Manager of Affiliate Marketing/Sales; Christopher Tzianabos, Account Executive
Program Hours: 24 hours
Program Format: Sporting events and specials
Satellite: Satcom IV/13
Subscriber Information: Affiliates: 170 as of 04/01/90; Subscribers: 320,000
Advertising Per Hour:N.A.

PRISM
(215) 668-2210

225 City Avenue
Bala Cynwyd, PA 19004

Parent Company: SportsChannel

Personnel: Donald Heller, VP General Manager; Sam Schroeder, VP Assistant General Manager; Daniel Ronayne, Director, Marketing; Lynn Lonker, Director, Programming; Jim Barniak, Sports Director; Daniel Ronayne, Director, Marketing; Jeanne Gengler, Affiliate Marketing Manager; Sally Leifer, Marketing Affiliate Representative; Lisa Stuchell, Marketing Coordinator; Suzanne Rioux, Advertising & Promotions Coordinator; Jacqueline Sandherr, Advertising Sales Representative
Program Hours: 24 hours
Program Format: Regional sports and movies
Subscriber Information:
Affiliates: 31 as of 02/01/90; Subscribers: 470,000; Price/sub: $6.00

PRO AM SPORTS SYSTEM
(313) 930-7277

24 Frank Lloyd Wright Drive
P.O. Box 3812
Ann Arbor, MI 48106-3812
Parent Company: Domino's Pizza
Personnel: Bill Wischman, General Manager; Kathi Hunt, Business Manager; Jillaina Harbaugh, Director, Affiliate Services; Bill Moren, Director, Marketing & Affiliate Relations; Mike Smith, Executive Producer
Program Hours: 6:00 p.m. - midnight CT weekdays; weekends vary.
Program Format: Detroit Tigers baseball, Detroit Pistons basketball, Detroit Red Wings hockey, University of Michigan and Michigan State basketball and hockey.
Satellite: Spacenet III/21
Subscriber Information:
Affiliates: 212 as of 4/4/90; Subscribers: 625,000
Advertising Per Hour: Regional-8 minutes/Local-1 minute

SAN DIEGO CABLE SPORTS NETWORK
(619) 263-9251

5159 Federal Blvd.
San Diego, CA 92105
Parent Company: Cox Cable
Personnel: Bob McRann, President; Marty Youngman, Manager; Moya Gollaher, Ad Sales Manager
Type Of Service: Pay-Per-View
Program Hours: Various
Program Format: San Diego Padres baseball, San Diego State University football games, boxing
Subscriber Information:
Affiliates: 6 as of 02/01/90; Addressable Subscribers: 575,000
Advertising Per Game: N.A.

SPORTSCHANNEL FLORIDA
(407) 994-0250

2295 Corporate Blvd. NW
Suite 140
Boca Raton, FL 33431
Parent Company: SportsChannel
Personnel: Jeffrey Genthner, General Manager; Harlan Singer, Chief of Operations; Rod Mickler, Director, Sales/Marketing; Deborah Benson, Affiliate Marketing Manager; Lynne Mixson, Public Relations Manager
Program Hours: 6:00 p.m. - 3:00 a.m. ET weekdays/noon - 3:00 a.m. ET weekends
Satellite: Satcom IV/14
Subscriber Information:
Affiliates: 37 as of 03/01/90; Subscribers: 950,000
Advertising Per Hour: N.A.

SPORTSCHANNEL LOS ANGELES
(213) 433-1985

1545 26th Street
Santa Monica, CA 90404
Parent Company: SportsChannel
Personnel: Lynn Woodard, VP & General Manager; Kevin McGuire, Director, Sales & Affiliate Marketing; Rockey Flintermann, Director, Programming & Network Operations; John Mella, Business Manager; George Jostlin, Manager, Affiliate Relations; Bob Green, Manager, Affiliate Relations; Paula Rosado, Manager, Affiliate Relations; Mary Beth Callahan, Manager, Creative Services; Patrick McCabe, Western Regional Advertising Sales; Ted Craddock, Senior Account Executive, Advertising Sales
Program Hours: 4:00 p.m.-1:00 a.m. PT weekdays; 10:00 a.m.-1:00 a.m. PT weekends
Satellite: Satcom IV/17
Subscriber Information:
Affiliates: 76 as of 4/2/90; Subscriber: 110,000
Advertising Per Hour: Regional-8 minutes/Local-2 minutes

SPORTSCHANNEL NEW ENGLAND
(617) 933-9300

10 Tower Office Park
Suite 600
Woburn, MA 01801
Parent Company: SportsChannel
Personnel: Mitchell Freund, VP General Manager; Stevan Reagan, Director, Operations; William Powell, Director, Affiliate Sales & Marketing; Paul Freehauf, Product Manager; Jeff Landis, Public Relations Manager
Regional Offices: Rainbow Advertising Sales Co. 855 Boylston Street, Boston, MA 02116 (617) 266-7711; /Rainbow Advertising Sales Co. 260 Madison Ave. New York, NY 10016 (212) 889-3380
Program Hours: 6:00 p.m.- 12:30 a.m. ET weekdays; 9:00 a.m.- 12:30 a.m. ET weekends
Satellite: Satcom IV/23, VideoCipher encrypted
Subscriber Information:
Affiliates: 165 as of 01/30/90; Subscribers: 1,183,715
Advertising Per Hour: N.A.

SPORTSCHANNEL NEW YORK
(516) 364-3650

150 Crossways Park West
Woodbury, NY 11797

Parent Company: SportsChannel
Personnel: Robert Pollichino, VP General Mgr; Jerry Passaro, Executive Producer & Director, Programming; James Bates, Director, Sales and Marketing; Richard Kahn, Director, Public Relations
Program Hours: 6:30 p.m. - 1:00 a.m. ET weekdays; extended hours on weekends
Satellite: Satcom IV/7, VideoCipher encrypted
Subscriber Information: Affiliates: 115 as of 02/01/90; Subscribers: 1,300,000
Advertising Per Hour: Regional-N.A./Local-up to 6 minutes, depending on event

REGIONAL NON-SPORTS SERVICES

A.I.B. CABLE NETWORK
(404) 892-0454

1580 Peachtree St.
Atlanta, GA 30309

Parent Company: A.I.B. Cable Network
Personnel: John Allen, President & General Manager; Olynn Allen, VP & Station Manager
Program Hours: 24 Hours
Program Format: Religious
Subscriber Information: Affiliates: 3 as of 04/01/90; Subscribers: 225,000;
Advertising Per Hour: 2 minutes

CABLE TV NETWORK OF NJ
(609) 392-4360

128 W State St.
Trenton, NJ 08608

Personnel: James DeBold, Executive Director; Sondra Eisen, Adminstrative Assistant; Joyce Aylesworth, Traffic Manager; Deborah Kolczynski, Controller; David Valentino, Chief Of Operations; Therese Dennison, Promotion Manager; Kathleen Moffat, Sales Manager
Program Hours: 24 Hours
Program Format: Education, entertainment and informational shows
Subscriber Information: Affiliates: 34 as of 03/14/90; Subscribers: 1,500,000

CATHOLIC TV NETWORK/ BAY AREA
(415) 326-7850

324 Middlefield Rd.
Menlo Park, CA 94025

Personnel: Brian Coyne, Director; Shirley Connolly, Program Director;
Program Hours: 8:00 a.m. - 10:00 p.m.PT
Program Format: Educational

THE CLASSIFIED CHANNEL
(408) 452-3388

1302-A North Fourth St.
San Jose, CA 95112

Parent Company: Heritage Cablevision
Personnel: J. Brown, General Manager; Laura Worth, Office Manager; Domenic Giusto, Production Manager; Leif Sandness, Account Executive; T.J. Hall, Account Executive; Diane Jensen, Account Executive
Program Hours: 24 Hours
Program Format: Classified advertising and information, arranged by various categories
Subscriber Information: Affiliates: N.A.; Subscribers: 215,000

FLORIDA TOURISM CHANNEL
(813) 586-1700

12465 92nd Way North
Largo, FL 34643

Parent Company: Florida Tourism Channel Inc.
Personnel: David Liddle, President; Diane Liddle, VP; Christina Back, Major Account Manager; Maria Dimego, Public Relations Director;
Regional Offices: Orlando Office: 1213 Richmond Hill, Winter Park FL. (813) 586-1200 Randy Centrella
Program Hours: 6 a.m. to 9 a.m. ET
Program Format: Tourist information
Satellite: Satcom 1R/22
Subscriber Information: Affiliates: 20 as of 03/22/90; Subscribers: 754,000
Advertising Per Hour: 3 minutes

NEWS 12 LONG ISLAND
(516) 496-1766

One Media Crossways
Woodbury, NY 11797

Parent Company: Rainbow Program Holdings
Personnel: Norm Fein, News Director; Glenn Fiskkin, Senior Executive Producer; Larry Henrichs, Executive Producer; Bill Zimmerman, Executive Producer; Drew Phillips, Executive Producer; Hardie Mintzer, Assignment Manager; Rick Young, Promotion Director; Robert Sullivan, Sales Manager/Long Island; Dick Moran, Sales Manager/NYC; Bert Goodstadt, Associate Sales Manager/NYC; Warren Spellman, Marketing Director
Regional Offices: Rainbow Advertising Sales/Long Island: 111 Crossways Park West, Woodbury, NY 11797; Rainbow Advertising Sales/NYC: 260 Madison Avenue, 14th Floor, New York, NY 10016.
Program Hours: 24 hours
Program Format: Regional news
Subscriber Information: Affiliates: 4 as of 12/31/89; Subscribers: 601,000; Price/sub: .25
Advertising Per Hour: Regional-N.A./Local-4 minutes

PENNERAMA
(814) 863-0023

Wagner Annex
University Park, PA 16802

Parent Company: WPSX-TV/ Penn State University
Personnel: Marlowe Froke, General Manager; John Grant, Manager; Walt Mahute, Business Manager; Kathleen Pavelko, Director, Programming & Production; Greg Petersen, Director, Promotion; Bruce Dunn, Director, Production; Deirdre Hines, Publicist
Program Hours: 24 Hours
Program Format: Instructional and general information
Subscriber Information: Affiliates: 27 as of 03/15/90; Subscribers: 800,000

NON SATELLITE-FED BASIC SERVICES

FUJISANKEI COMMUNICATIONS INTERNATIONAL
(213) 553-5828

2049 Century Park East
Suite 820
Los Angeles, CA 90067
Parent Company: The Group
Personnel: M. Kakutani, Executive VP; Paul Yanagisawa, Director, Business Development;
Program Hours: 5 hours
Program Format: Variety
Subscriber Information: Affiliates: 8 as of 03/23/90; Subscribers: 17,000;
Advertising Per Hour: Local-2 minutes

NON SATELLITE-FED PAY SERVICES

NIPPON GOLDEN NETWORK
(808) 538-1966

567 S. King St.
Suite 110
Honolulu, HI 96813
Personnel: Dennis Ogawa, President
Program Hours: 6:00 p.m.-11:00 p.m. weekdays
Program Format: Foreign-language films and cultural programs
Subscriber Information: Affiliates: 7 as of 03/01/90; Subscribers: 15,792;
Advertising Per Hour: Local-2 minutes

PAY-PER-VIEW TITLE SUPPLIERS

CHOICE ENTERTAINMENT
(213) 659-6070

8730 Sunset Boulevard
Suite 290
Los Angeles, CA 90069
Parent Company: Independent Entertainment Group
Personnel: Richard Kulis, President; Judith Kulis, VP; Lisa Phillips, VP

COLUMBIA PICTURES
(212) 702-6524

711 Fifth Avenue
4th Floor
New York, NY 10022
Personnel: Dennis Wood, VP Worldwide Pay TV; Lawrence Smith, Manager, Pay TV; Cheryl Koll, Coordinator, Worldwide Pay TV
NOTE: This includes Tri-Star titles

INDEPENDENT PPV MOVIE NETWORK
(213) 659-6070

8739 Sunset Boulevard
Suite 290
Los Angeles, CA 90069
Parent Company: Independent Entertainment Group
Personnel: William Sager, Senior VP; Mark Zutz, Manager

MGM/UA TELECOMMUNICATIONS
(213) 280-6276

10000 W. Washington Blvd.
Culver City, CA 90232
Parent Company: MGM/UA Communications
Personnel: Joseph Abrams, Senior VP World Pay TV; Bill Lee, Director, Pay TV Programming

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MARLEE COMPANY
(213) 393-0822

470 25th Street
Santa Monica, CA 90402
Personnel: Jonathan Kramer, President
NOTE: formerly Skouras Pictures

ORION PICTURES
(212) 715-1106

711 Fifth Avenue
6th Floor
New York, NY 10022
Personnel: Larry Hilford, Chairman Orion Home Entertainment

SAMUEL GOLDWYN COMPANY
(213) 284-9280

10203 Santa Monica Blvd.
Los Angeles, CA 90067
Personnel: Richard Askin Jr., President TV; Jeri Sacks, VP Cable & Ancillary Sales; Ron Wanless, Senior VP Worldwide Marketing; Dan Gelfand, VP Advertising; Leonie de Picciotto, VP Publicity

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TWENTIETH CENTURY-FOX PAY TV
(213) 203-1417

PO Box 900
Beverly Hills, CA 90213
Personnel: Lucy Hood, Director, Domestic & International Pay TV

UNIVERSAL PAY TELEVISION
(818) 777-4317

70 Universal City Plaza
Universal City, CA 91608
Personnel: Jerry Hartman, VP/Sales and Marketing

WARNER BROS. PAY TELEVISION
(212) 484-8000

75 Rockefeller Plaza
13th Floor
New York, NY 10019
Parent Company: Time Warner
Personnel: Edward Bleier, President; Stanley Solson, VP Sales & Administration; Eric Frankel, VP Marketing; J.T. Shadoan, Director Financial Affairs; Margaret Jelcich, Director, Client Services; Anthony Cochi, Manager, Accounting & Data Services; Charlotte Marlis, Manager, Research & Administration; Jeffrey Bernstein, Manager, Marketing, Sales & Administration; Gary Hahn, Manager, Advertising, Publicity & Promotion

CABLE/TVRO PACKAGE PROVIDERS

PRIMETIME 24
(212) 599-4440

342 Madison Ave.
Suite 1520
New York, NY 10173
Personnel: Kazie Metzger, President; Janet Foster, Executive VP Operations; Todd Hardy, Executive VP Legal; Ann Kirschner, Executive VP Marketing & Sales; Karen Tardy, VP Marketing & Communications Systems; Jean Keamy, Marketing Manager; Scott Shultz, Sales Manager
Program Hours: 24 Hours
Program Format: Three-channel package of broadcast network affiliates, offering general interest fare
Satellite: Satcom IIR/2,4,12; VideoCipher encrypted

ANNOUNCED SERVICES

ACTV
(212) 262-2570

1270 Avenue of the Americas
Suite 2401
New York, NY 10019
Parent Company: ACTV Inc.
Personnel: Leonard Schaier, President; Dr. Michael Freeman, Chairman; Dr. Diana Gagnon, VP; David Reese, CFO
Program format: Interactive entertainment, education and information programs
Projected launch: 4th Quarter 1990

THE ASIA NETWORK
(808) 521-8066

1188 Bishop Street
Honolulu, HI 96813
Parent Company: The Asia Network Inc.
Personnel: K.S Chung, President & CEO; Dave Moore, VP Engineering; George Noguchi, Counsel; Jay Chung, VP Programming; T.H. Kim, VP Marketing Asia; Mike Meyer, U.S. Marketing Consultant
Regional Offices: North American Sales and Marketing, 2269 Kilihau Street, Honolulu, Hawaii 96819
Program Hours: 12 Hours
Program Format: Asian-language programming, including daily blocks of Chinese, Korean, and Filipino programming
Satellite: Pending
Advertising Per Hour: National-8 minutes/Local-2 Minutes
Projected launch: 1990

CAREER CHANNEL NETWORK
(415) 326-8000

PO Box 536
Menlo Park, CA 94026
Parent Company: The Keegan Group
Personnel:R. Peter Keegan, Chairman/CEO; Roland Hier, COO; J. Walter Keegan, VP Marketing; John Ralston, Affiliate Sales
Regional Offices: Soon to have offices in Denver, New York, Los Angeles, Atlanta and London.
Program Format: National and regional career news and information services
Projected launch: 11/90

CAREER TELEVISION NETWORK
(407) 333-9700

300 International Parkway
Heathrow, FL 32746
Personnel: Jerry Stone, Chairman, CEO; Lee Munizzi, COO; Joe Vale, Senior VP Sales & Affiliate Relations; Thomas DiCandia, VP Internal Operations; Trea Bennett, Promotions Coordinator; Elaine Jacobson, Public Relations Coordinator; M. Shiffman, Senior VP Ad Sales;
Program Hours: 8:00 AM to 12:00 Midnight ET
Program Format: Career-oriented programming
Projected launch: 10/90

CD-18/THE DIGITAL MUSIC NETWORK

(212) 983-3300

342 Madison Ave.
Suite 505
New York, NY 10173

Parent Company: International Cablecasting Technologies
Personnel: Jerold Rubinstein, Chairman; W. Thomas Oliver, President; Molly Seagrave, VP Communications; John Flannery, Director, Affiliate Sales & Marketing; Mike Davis, Network Operations
Program Hours: 24 hours
Program Format: 18 + channels of compact disc sound music
Satellite: Satcom IV/19, VideoCipher encrypted
Projected launch:4th Quarter 1990

COWBOY TV NETWORK

(512) 288-6430

7748 Highway 290 West
Austin, TX 78736

Personnel: Mack Long, CEO
Regional Offices: Larry Schneider, Buzz Hassett-Denver CO (800) 278-2922
Program Hours: 24 Hours
Program Format: Western movies, music, originals.
Advertising Per-Hour: National-11 minutes/Local-2 minutes
Projected Launch: 6/90

Digital
CABLE RADIO

DIGITAL CABLE RADIO

(215) 957-8290

2200 Byberry Road
Hatboro, PA 19040

Parent Company: Jerrold Communications
Personnel: David Del Beccaro, General Manager; Paul Clough, Director, Marketing
Regional Offices: Pamela Jensen, Director, Affiliate Relations, Central Region-1900 East Golf Rd.,Suite #100M, Schaumburg, Il 60173-5011 Thomas Ferraro, Director, Affiliate Relations, Eastern Region, 2200 Byberry Rd., Hatboro, PA 19040 Terry Taylor, Director, Affiliate Relations, Western Region, 566 N. Diamond Bar, Diamond Bar 91765
Program Hours: 24 Hours
Program Format: 18 channels of commercial-free music. 10 channels of cable TV audio simulcasts
Satellite: TBA;VideoCipher encrypted
Projected launch: 2nd Quarter 1990

THE DIGITAL RADIO CHANNEL

(213) 513-1630

22010 S. Wilmington Ave.
Carson, CA 90745

Parent Company: Digital Radio Laboratories Inc.
Personnel: William Delany, President; Douglas Talley, CEO; Robert Aten, CFO; Marianne Seiler, VP Marketing; Michael Hanafee, Senior VP Affiliate Sales
Program Hours: 24 Hours
Program Format: Various-91 audio feeds
Satellite:TBA; VideoCipher encrypted
Projected launch: 6/90

GLOBAL VILLAGE NETWORK

(202) 393-3818

1712 Corcoran Street N.W.
Washington, DC 20009

Personnel: Gloria Borland, Chairman
Program Hours: 24 Hours
Program Format: International business and lifestyle information.
Advertising Per Hour: National-3 minutes/Local-3 Minutes
Projected launch: 1991

THE HOW-TO CHANNEL

(213) 820-2610

11661 San Vicente Boulevard
Suite #402
Los Angeles, CA 90049

Personnel: Que Spaulding, President; Mike Hale, Executive VP
Program Hours: 24 Hours
Program Format: How-To programs; subjects include home repairs and remodeling; auto repair, photography, cooking, computers, gardening, fitness and community service
Advertising Per Hour: National-10 minutes/Local-3 minutes
Projected Launch: 1st Quarter 1991

INTERACTIVE NETWORK

(415) 960-1000

1991 Landings Drive
Suite 230
Mountain View, CA 94043

Personnel: John Lockton Jr., Chairman; David Lockton, President; Kevin Randolph, VP Marketing; Robert Brown, VP, Engineering; Gary Sadamoni, Regional Marketing; Patricia Ursenbach, Product Manager
Program Hours: 8:00 a.m. to 10:00 p.m. PT
Program Format: Simulcast
Projected launch:1990

MAIN STREET

(203) 965-2244

GTE One Stamford Forum
Stamford, CT 06904

Parent Company: GTE
Personnel: Tom Grieb, General Manager
Program Hours: 24 hours
Program Format: Consumer

interactive programming, including shopping, travel, entertainment and financial services.
Advertising Per Hour:N.A.
Projected launch:TBA

MAXIMUM ENTERTAINMENT NETWORK
(213) 556-2450

1901 Avenue of the Stars, Suite 1774
Los Angeles, CA 90067
Parent Company: Full Circle Entertainment Inc.
Personnel: Ron Harris, CEO; Jami Allen, COO; Robert Carmen, CFO
Program Format: Pay/PPV entertainment directed to men
Projected launch: 3/91

MUSIC-IMAGE CHANNEL
(415) 326-8000

PO Box 9600
Palo Alto, CA 94309
Parent Company: The Keegan Group
Personnel:R. Peter Keegan, Chairman/CEO; J.M. Keegan, President COO; Drew Youngs, President A&R Division
Program Hours: 24 hours
Program Format: Instrumental stereo music programming service accompanied by images of nature, art, the world's wonders and people.
Projected launch:11/90

THE SCI-FI CHANNEL
(407) 395-7001

2000 Glades Raod
Suite 206
Boca Raton, FL 33431
Personnel: Mitchell Rubenstein, President; Laurie Silvers, CEO; Judy Mann, Marketing Director; Barry Harfenes, Studios Manager; Jeffrey Rifkin, Director of Affiliate Sales West Coast; Larry Winokur, Public Relations Representative; Jeff Duclos, Public Relations Representative; Isaac Asimov, Martin Greenberg & Gene Roddenberry, Advisors
Program Hours: 24 Hours
Program Format: Science fiction, fantasy, horror and science fact.
Satellite: Satcom IV/TBA, VideoCipher encrypted
Subscriber Information: Affiliates: 6 as of 03/01/90; Subscribers: 500,000
Advertising Per Hour: National-7 minutes/Local-3 minutes
Projected launch:1st Quarter 1991

Top 100 MSO's

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	6,792,535	(1/90)
2.	American Television & Communications Corp.	4,300,000	(12/89)
3.	UA Entertainment	2,592,000	(2/90)
4.	Continental Cablevision	2,525,000	(1/90)
5.	Warner Cable Communications	1,713,000	(1/90)
(8) 6.	Cox Cable Communications	1,555,213	(1/90)
(6) 7.	Comcast	1,535,000	(1/90)
(7) 8.	Storer Cable Communications	1,530,000	(1/90)
9.	Cablevision Systems	1,474,680	(3/90)
10.	Jones Intercable/Spacelink*	1,454,648	(4/90)
11.	Newhouse Broadcasting	1,200,000	(11/89)
12.	Heritage Communications	1,131,343	(11/89)
13.	Times Mirror Cable TV	1,082,000	(2/90)
(15) 14.	Cablevision Industries	1,044,396	(3/90)
(14) 15.	Viacom Cable	1,016,000	(2/90)
16.	Sammons Communications	873,590	(1/90)
17.	Century Communications	825,000	(2/90)
18.	Adelphia Communications	817,000	(3/90)
19.	Paragon Communications	764,734	(1/90)
20.	Falcon Cable TV	700,000	(10/89)
21.	Cooke Cablevision	591,032	(12/89)
22.	Telecable	584,552	(1/90)
23.	KBLCOM	550,000	(2/90)
24.	Scripps-Howard	540,000	(1/90)
25.	Multivision Cable TV	499,491	(1/90)
26.	Tele-Media	475,163	(9/89)
27.	Prime Cable	468,822	(1/90)
28.	Lenfest Group	457,886	(3/90)
29.	Maclean Hunter Cable TV	437,500	(1/90)
30.	Post-Newsweek Cable	413,213	(1/90)
31.	Cencom Cable	410,000	(11/89)
32.	TCA Group	405,000	(1/90)
33.	Multimedia Cablevision	328,902	(1/90)
34.	Colony Communications	327,924	(1/90)
35.	Simmons Communications	315,000	(12/89)
36.	Rifkin & Associates	312,700	(1/90)
37.	TKR Cable	293,212	(2/90)
38.	Western Communications	287,800	(1/90)
39.	Triax Communications	279,612	(1/90)
40.	Star Cablevision Group	240,096	(8/89)
41.	Hauser Communications	238,000	(1/90)
42.	Service Electric Cable TV Inc.	220,000	(1/90)
43.	Greater Media	205,000	(9/89)
44.	King Videocable	193,413	(1/90)
45.	Columbia International	191,000	(3/90)
46.	Sutton Capital	189,179	(9/89)
47.	Harron Communications	187,000	(4/90)
48.	Media General	181,785	(1/90)
49.	Insight Communications	183,000	(2/90)
50.	C-Tec Cable Systems	175,000	(2/90)
51.	U.S. Cable Corp.	172,500	(1/90)
52.	Palmer Communications	166,059	(1/90)
53.	Armstrong Utilities	153,902	(1/90)
54.	Northland Communications	141,398	(11/89)
55.	Summit Communications	141,000	(10/89)
(57) 56.	Bresnan Communications	129,780	(1/90)
(58) 57.	Booth Communications	125,437	(1/90)
(59) 58.	McDonald Group	125,000	(1/90)
(60) 59.	Susquehanna Broadcasting	117,109	(1/90)
(61) 60.	United Video Management	117,000	(1/90)
(62) 61.	Pencor Services	108,564	(1/90)
(63) 62.	Sonic Communications	97,837	(12/89)
(64) 63.	Midcontinent Cable Systems Co.	95,550	(6/89)
(65) 64.	WEHCO Video	95,666	(1/90)
(66) 65.	First Carolina Communications	94,253	(1/90)
(67) 66.	Gilbert Media	93,000	(1/90)
(68) 67.	Chambers Communications	89,100	(3/90)
(69) 68.	Coaxial Communications	83,300	(5/89)
(70) 69.	Barden Cablevision	79,783	(1/90)
(71) 70.	InterMedia Parnters	78,000	(3/90)
(72) 71.	James Cable Partners	76,756	(1/90)
(73) 72.	Mission Cable	74,223	(1/90)
(74) 73.	Douglas Communications	72,400	(1/90)
(75) 74.	Leonard Communications	66,000	(2/90)
(76) 75.	Fanch Communications	65,000	(1/90)
(77) 76.	Cardinal Comunications	61,287	(1/90)
(78) 77.	Omega Communications	60,000	(8/89)
(79) 78.	Helicon Corp.	60,000	(1/90)
(80) 79.	Telesat Cablevision Inc.	57,235	(6/89)
(81) 80.	Galaxy Cablevision	56,489	(2/90)
(82) 81.	State Cable TV	56,200	(1/90)
(83) 82.	Prestige Cable TV Inc.	52,774	(1/90)
(84) 83.	New England Cablevision	52,409	(1/90)
(85) 84.	Masada Corp.	52,000	(2/90)
(86) 85.	Star Cable Associates	51,875	(2/90)
(87) 86.	Rock Associates	49,053	(1/90)
(88) 87.	Donrey Media Group	49,040	(12/89)
(90) 88.	Cable America Corp.	48,130	(3/90)
89.	Republic Communications Corp.	47,000	(1/90)
(new) 90.	Amzak Cable	45,125	(3/90)
91.	360 Corp.	45,000	(5/89)
92.	CableSouth Inc.	43,420	(10/89)
93.	Cable Holdings Inc.	43,135	(10/89)
(new) 94.	Vista Communications	41,962	(1/90)
(94) 95.	Eastern Connecticut Cable TV	41,820	(6/89)
(95) 96.	C4 Media	41,275	(7/89)
(96) 97.	Raystay Co.	40,447	(8/89)
(97) 98.	Acton Corp.	30,400	(3/89)
(98) 99.	Schurz Communications	40,078	(8/89)
(99) 100.	Benchmark Communications	38,000	(1/90)

( ) Rank last listing

*** includes Crown Cable systems**

Subscriber counts are provided by MSOs and systems to Cable Vision. *Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 345 Park Avenue So., 9th Floor, New York, NY 10010.*

Top 100 Systems

Rank	Location	Operator	Basic subs	
1.	Long Island, NY	Cablevision Systems	523,502	(3/90)
2.	Orlando/Central Complex, FL	ATC	400,000	(10/89)
3.	San Diego, CA	Cox Cable	309,584	(1/89)
4.	Phoenix, AZ	Times Mirror	287,240	(2/90)
5.	San Antonio, TX	KBLCOM	234,835	(6/89)
6.	Puget Sound, WA	Viacom	234,200	(1/90)
7.	Manhattan, NY	ATC	231,864	(6/89)
8.	East Orange, NJ	Maclean Hunter	217,000	(3/90)
9.	Honolulu, HI	ATC	206,251	(10/89)
10.	Chicago Suburbs, IL	Continental	181,537	(9/89)
11.	Rochester, NY	ATC	180,000	(9/89)
12.	Wayne, NJ	UA Entertainment	179,624	(2/90)
13.	Houston, TX	Warner	179,000	(9/89)
14.	Hampton Roads, VA	Cox Cable	170,148	(1/90)
15.	Louisville/Jeff. Co., KY	Storer Communications	170,000	(8/89)
16.	Brooklyn/Queens, NY	ATC	170,000	(1/90)
17.	Chicago, IL	TCI	169,608	(3/90)
18.	Cleveland, OH	Cablevision Systems	168,773	(2/90)
19.	Cherry Hill, NJ	Garden State Cable	168,000	(9/89)
20.	Cincinnati, OH	Warner	167,000	(6/89)
21.	Atlanta, GA	Prime Cable	166,000	(9/89)
22.	Fairfax, VA	Media General	164,519	(6/89)
23.	Connecticut Complex	Cablevision Systems	163,084	(2/90)
24.	Tulsa, OK	UA Entertainment	159,551	(7/89)
25.	Kansas City, MO	ATC	158,500	(11/89)
26.	Jacksonville, FL	Continental Cablevision	154,600	(5/89)
27.	Hartford/Plainville/Vernon, CT	UA Entertainment	152,683	(6/89)
28.	Montgomery County, MD/ Arlington, VA	Hauser	150,000	(1/90)
29.	Charlotte, NC	ATC	148,850	(9/89)
30.	San Jose/Campbell, CA	Heritage	145,000	(6/89)
31.	Baltimore County, MD	Comcast	144,000	(6/89)
32.	Memphis/W. Memphis, TN	ATC	143,957	(10/89)
33.	Manhattan, NY	Paragon	143,500	(6/89)
34.	San Francisco, CA	Viacom	141,600	(1/90)
35.	Pompano, FL	Continental	140,084	(9/89)
36.	Buffalo, NY	Adelphia Communications	139,515	(8/89)
37.	Denver (suburbs), CO	UA Entertainment	139,303	(6/89)
38.	San Diego, CA	ATC	135,300	(11/89)
39.	St. Louis, MO	Cencom	135,230	(8/89)
40.	Seattle, WA	TCI	131,315	(3/90)
41.	Austin, TX	ATC	126,100	(10/89)
42.	Chicago Suburbs, IL	Jones	126,000	(2/90)
43.	Martin/Stuart Co. FL	ATC	125,000	(10/89)
44.	Warren, NJ	TKR	124,000	(2/90)
45.	Tacoma, WA	Viacom	120,700	(1/90)
46.	San Diego County, CA	Times Mirror	115,884	(2/90)
47.	Pinellas County, FL	Newhouse	114,000	(6/89)
48.	Hillsborough/Tampa, FL	Paragon	112,103	(1/90)
49.	Wilmington, DE	Heritage	112,000	(6/89)
50.	Grand Rapids, MI	UA Entertainment	111,198	(6/89)
51.	Orange Couty, LA	Times Mirror	111,506	(2/90)
52.	Toledo, OH	Blade Communications	110,785	(5/89)
53.	Southeast Michigan	Comcast	110,000	(6/89)
54.	Raleigh/Durham, NC	ATC	109,000	(9/89)
55.	Las Vegas, NV	Prime Cable	107,288	(5/89)
56.	Dallas, TX	Heritage	107,244	(6/89)
57.	Jefferson Parish/Kenner, LA	Cox Cable	107,207	(2/90)
58.	Boston/Brookline, MA	Cablevision Systems	106,346	(2/90)
59.	San Juan, PR	Multivision Cable	106,046	(6/89)
60.	Nashville, TN	Viacom	105,400	(1/90)
61.	Indianapolis, IN	Comcast	104,000	(6/89)
62.	Chicago, IL	Group W	104,000	(3/90)
63.	Richmond, VA	Continental	102,121	(10/89)
64.	Pittsburgh, PA	TCI	99,187	(3/90)
65.	Jackson, MS	ATC	98,915	(10/89)
66.	Monmouth, NJ	Sutton Capital	97,579	(9/89)
67.	Greensboro, NC	ATC	96,140	(10/89)
68.	St. Petersburg, FL	Paragon	95,412	(2/89)
69.	Columbus, OH	Warner	95,000	(9/89)
70.	Reading, PA	ATC	95,000	(10/89)
71.	Naples, FL	Palmer	94,450	(6/89)
72.	Worcester Complex, MA	Greater Media	94,897	(9/89)
73.	Albuquerque, NM	Jones Intercable	91,205	(12/89)
74.	Portland, OR	KBLCOM	91,500	(8/89)
75.	Dade/Broward County, FL	Storer	90,000	(8/89)
76.	Wichita, KS	Multimedia	88,732	(9/89)
77.	Independence,MO	Jones	88,628	(8/89)
78.	Minneapolis/St. Paul suburbs, MN	Hauser	88,000	(1/90)
79.	Fresno, CA	Continental	87,060	(2/90)
80.	Tucson, AZ	Cooke	86,976	(8/89)
81.	Akron, OH	Warner	86,000	(9/89)
82.	Fayetteville, NC	ATC	86,000	(10/89)
83.	Milwaukee, WI	Warner	86,000	(9/89)
84.	Toms River, NJ	Adelphia	85,826	(2/90)
85.	Harrisburg, PA	Sammons	85,200	(8/89)
86.	Orange County, CA	KBLCOM	85,100	(8/89)
87.	Baton Rouge, LA	UA Entertainment	84,976	(6/89)
88.	Dover/Morristown, NJ	Sammons	84,640	(8/89)
89.	W. San Fernando Valley, CA	CV Industries	82,967	(2/90)
90.	South Bend, IN	Heritage	82,744	(6/89)
91.	Buffalo, NY	TCI	82,629	(3/90)
92.	Houston Suburbs, TX	Prime Cable	82,000	(6/89)
93.	Medford, MA	Warner	82,000	(6/89)
94.	Oklahoma City, OK	Cox Cable	81,310	(1/90)
95.	New Orleans, LA	Cox Cable	80,604	(1/90)
96.	Oakland County, MI	UA Entertainment	80,564	(8/89)
97.	Providence/Warwick, RI	Times Mirror	80,523	(2/90)
98.	Columbia, SC	CV Industries	78,818	(2/90)
99.	Baltimore, MD	UA Entertainment	78,164	(3/90)
100.	Allentown, PA	Service Electric	78,000	(8/89)

The CABLE POLL DATABASE

™Midwest CATV • CED • CableVision

Rapid-fire new developments slow fiber installments

By Scott Barrett

The cable industry's steady pursuit of fiber technology appears to be taking a breather.

According to a February survey by Midwest CATV and *CableVision*, the number of operators planning to install fiber optic technology is down by eight percentage points, from 82 percent in March, 1989, to 74 percent in February, 1990.

The Cable Poll™ also shows a drop in the number of systems that have actually budgeted to add fiber during the current year. Only 7 percent of the 396 reporting cable systems have set aside such funds. Last year, 21 percent of sytems polled had budgeted to install fiber.

Number

3

in a series of eight

Despite the slowdown in planning for fiber, however, the number of systems that have already implemented fiber doubled this year to 6 percent of the Cable Poll™ sample. Last year's figure was 3 percent of systems polled.

Wendell Bailey, vice president of science and technology at the National Cable Television Association, blames the drop in planning and budgeting for fiber on the amount of testing still underway on the technology. Industry sources estimate that cable operators nd equipment suppliers are spending between $100 million and $140 million on such testing.

Bailey adds it is still early to make any definitive assessments of early test results, but comments that, "in general [cable systems] are happy with what they are seeing."

Tom Schatz, fiber optics manager at Anixter Communications, notes that the industry's tests of fiber optic equipment have resulted in "fewer systems ordering equipment right now." Orders of fiber technology are being put on hold, Schatz says, as systems await "magical breakthroughs in [fiber optic] performance" that will reduce the cost of fiber installation and maintenance. Add to that the issue of prices: operators, "are also waiting for prices to come down," Schatz says.

Once all the testing currently underway yields some solid results, Schatz believes "an explosion in buying" of fiber equipment could begin. Meanwhile, February's Cable Poll™ found the number of systems that have installed fiber optic technology in trunk or supertrunk runs this year has fallen three percentage points, from 41 percent last year to 38 percent this year. The percentage of systems that have budgeted trunk or supertrunk fiber installations stayed the same—48 percent—as a year ago.

The percentage of respondents with no plans to install fiber in trunk or supertrunk runs fell slightly from 11 percent last year to 10 percent this year.

Finally, the Cable Poll™ shows a majority of the responding cable systems ranked their level of concern about the cost of installing fiber as "a lot." ■

If you have budgeted for, or installed fiber optic technology, is it trunk or supertrunk runs, AM, FM or digital?

# Subscribers

	Total	Less 10K	10K -50K	Over 50K
Total	43	10	23	8
% AM	44	30	52	50
% FM	21	30	17	25
% Digital	12	30	9	0
% Don't know	23	10	22	25

How concerned are you with the cost of installating fiber optic technology?

# Subscribers

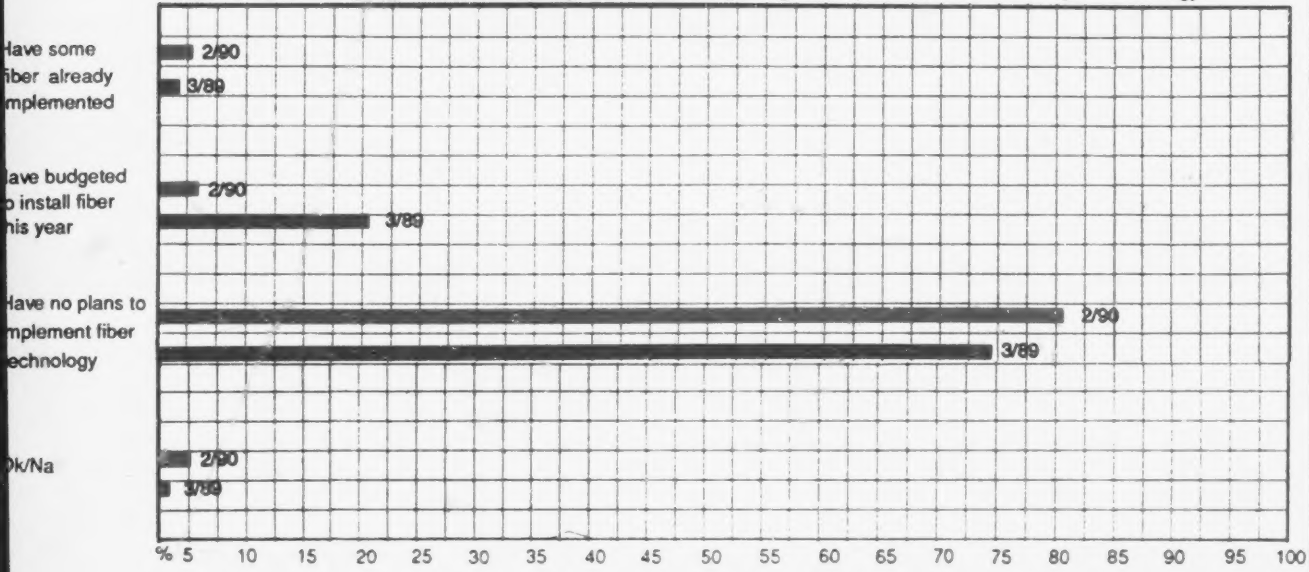
	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
% a lot	30	30	36	25
% some	22	17	26	47
% very little	13	12	15	6
% none	19	22	15	13
% Don't know	15	20	9	9

HOW THE POLL WAS CONDUCTED: The Cable Poll™ is conducted for Midwest CATV and *CableVision* magazine by Ryan/Samples Research Inc. Telephone interviews for this edition of the poll were conducted Feb. 1-15 with a random sample of 396 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points.

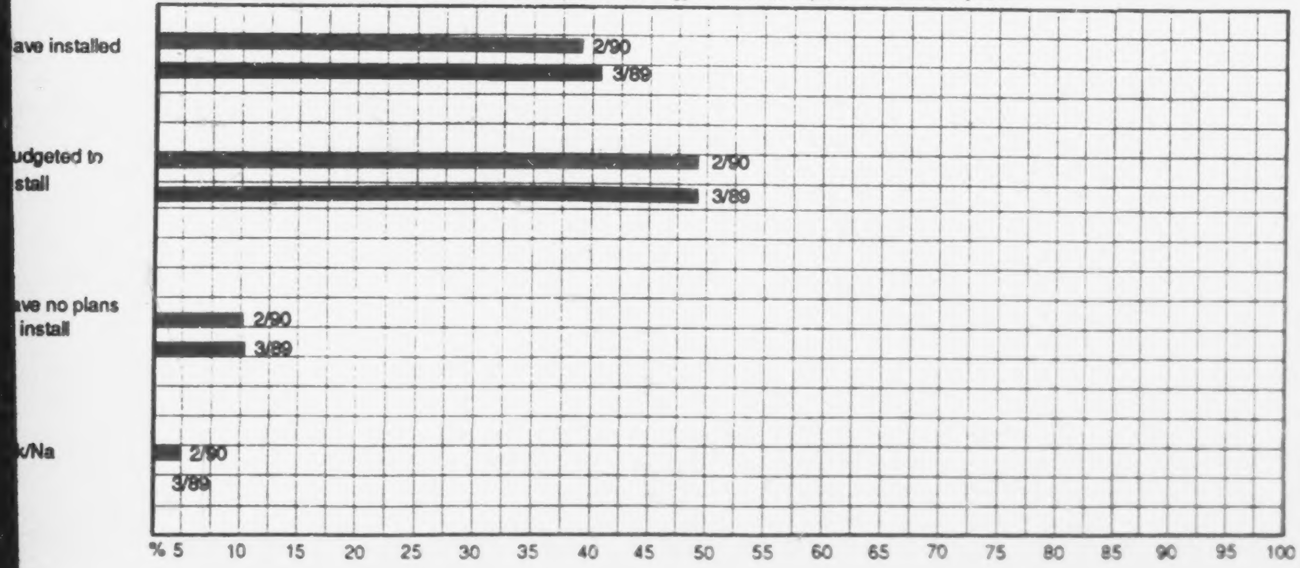
Adding up your answers:

PLEASE NOTE: THE FIRST ROW OF FIGURES IN THE FIRST TWO CHARTS ARE %S

Which of the following best describes your system's status regarding the implementation of fiber optic technology?



Have you installed or budgeted to install fiber optic technology in trunk or supertrunk runs this year?



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CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

MAY 7, 1990

WHY IS THIS MAN SMILING?

Prime Cable's Jerry

GUIDES GET SERIOUS

LO GROWS UP

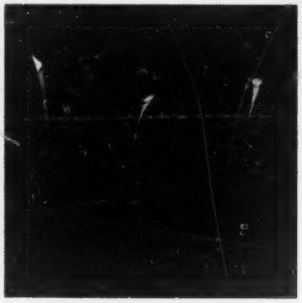
NCTA EQUIPMENT PREVIEW

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT MAY 7, 1990

FEATURES

PROGRAMMING 28
Local origination is at a crossroads: should it turn a profit or serve as an investment in community relations? Five of cable's biggest LO players talk it over in a roundtable interview.



ADVERTISING 38
Why did cable operators lose half their ad avails in NBA games on TNT? Ask the teams selling spots on local stations.

MARKETING 50
Cable guides are competing like never before, but which is best—monthly, weekly, or biweekly; system-specific or generic; cable-only or comprehensive?

TECHNOLOGY 56
It's hardware heaven for operators headed for NCTA's Atlanta bash. We've previewed the new goodies from some of cable's biggest suppliers.

COVER STORY

Why Is This Man Smiling? 44
Prime Cable's Jerry Lindauer, likely to be elected as NCTA's next chairman, sizes up the turbulent year ahead.

HANDBOOK

Crime Busting in Jersey City 68
A low-budget take-off of *America's Most Wanted* pays big dividends for a local operator.

Slick Sports Made Easy 72
ESPN executive producer Bill Fitts offers tips on putting a professional shine on local sports cablecasts.

DEPARTMENTS

BETWEEN THE LINES ... 8
Comedy Channel and HA! TV merger talks may be heating up, but insiders say the parties are far apart...International co-production and foreign expansion dominate cable's MIP agenda...Olympics PPV carries huge price tag but tantalizing potential for operators...Digital audio trio prepare for launch.

CABLE POLL 80
PPV continues to gain ground, but barker channel use has fallen off since a year ago.

CALENDAR 88
NCTA headlines May events

PARTING WORDS 90
An internationally telecast tribute to Nelson Mandela didn't air live in the U.S., but don't blame cable.

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ABP BPA

Guides Get Serious

The race to lead the pack of TV listing magazines just got faster

By Steve Weinstein

Warner Cable's award-winning *Channel Guide* for its Ohio properties, handled through J.D. Publishing Inc. from Glendale, Wisconsin

When TVSM took over Cable Publications Inc., publisher of *TV Entertainment*, at 5:30 p.m. on April 4, it marked a new phase in the cable guide wars. Standing directly in the line of fire is *TV Guide*, which is fighting to establish a relationship with cable operators, *TV Host*, which offers operators eight different formats to choose from, and several smaller regional and boutique publishers.

The acquisition put a single company in control of 75 percent of the cable guide industry. It also positions the company nicely to emerge a major player no matter what kind of guide or guides the cable industry finally decides is best, now that guides play a major role in marketing basic services to consumers.

In addition to owning *TV Entertainment*, TVSM publishes another established monthly, *Cable Guide* and a newly-launched weekly, *TV Time*, which is challenging *TV Guide* in San Diego and Long Beach, Calif.

At the helm of the TVSM ship is publisher Alan Wragg. "We've become the thousand-pound gorilla in the business," he says. "We're very aggressively pursuing other major systems we're not now serving."

Freebees Losing Favor

At issue in the guide race is what's best for cable viewers—and operators—in a continually expanding TV environment. The weeklies are putting pressure on the more established monthlies, especially those that are still distributed free as a promotional device by operators.

"(Free) cable listing guides are receding because they're expensive for the cable operator" maintains Charles Kinsolving, senior vice president for marketing at the Newspaper Advertising Bureau—a not disinterested observer. "Obviously it comes out of the bottom line somehow."

The trend away from freebees is in evidence at TVSM. One-third of subscribers to its monthly, *Cable Guide*, pay for it, according to TVSM senior vice-president Irv Kalick, while 80 percent pay for *TV Entertainment*, which will remain a separate publication for the foreseeable future. "We're comfortable with the merger," says Bob Thomson, vice-president of Tele-Communications Inc., a major supporter of *TV Entertainment*. "The new owners paid a call on our management and reassured them."

Monthly cable guides also suffer from syndex changes and last-minute program announcements, especially if they cover broadcast (independent stations are notorious for last-minute schedule changes).

TV Host, with 2.3 million subscribers, runs a distant second to TVSM, which goes to 11.3 million subscribers, in the system-specific race. To meet the varied needs of the systems it serves, *TV Host* has been publishing in three frequencies: monthly, weekly and most recently, twice-monthly in Baltimore.

Fine-Tuning Frequency

Twice-monthly offers a transition between free monthlies and paid weeklies, says David Stefanic, president of *TV Host,* who adds that subscribers don't want to pay more than $20 a year for a guide.

The weeklies offer the advantage of being paid for by subscribers and of offering more up-to-date listings. They haven't yet proven, however, that subscribers are willing to pay for the extras they bring. In one of the publishing industry's most famous flops, Time Inc. lost $47 million in 1983 when it tried to sell systems *TV Cable Week,* a system-specific guide.

TVSM is now a "1,000 pound gorilla" among guides, says publisher Alan Wragg

Since then, printing and information-gathering technology have improved to the point that guides are routinely system-specific; that is, they tailor their listings so that programs are identified by channel number, not network.

System operators like the promotional aspect of system-specific guides. Paul Gregg, vice president of sales and marketing at Times Mirror's Cable Television, says he likes the fact that there are no "conversion pages" for channel-to-system. "We want to be as user friendly as possible," he adds.

Guides like *TV Time* and *TV Guide* also include broadcast listings, while many monthlies, like *Cable Guide,* do not. Including broadcast not only makes the guides more comprehensive but adds to the viewer's sense that cable is an integral part of the TV mix.

Postage is also a factor. As operators have added new channels, bulky monthly guides have become more expensive to mail. It costs less than 10 cents to mail a 170-page copy of Viacom Cablevision's monthly Milwaukee guide, according to J.D. publisher Michael Drescher, while weeklies can often qualify for a much cheaper newspaper rate. But because of their frequency, weeklies cost more to mail overall. "That's why we didn't take on *TV Guide,*" says Hugh Jencks, general manager of Booth Communications in Birmingham, Mich., which contracts with *Cable Guide.*

Operator Interest Grows

"For years, we were trying to introduce weekly system-specific guides to other systems," *TV Host*'s Stefanic says. "The industry was basically growing from a pay standpoint and wasn't interested in system-specific weeklies. They felt *TV Guide* and newspapers were doing an adequate job. Now, all of a sudden, the industry recognizes they need system-specific guides. Why? The hype flattened out."

Another reason operators tend to prefer system-specific guides is that they make it easier for subscribers to find newly introduced channels. Viewers need program information if they are to sample shows; but new channels can be difficult to find on a crowded cable dial.

TV Guide isn't system-specific, but it scored a hit two years ago when it launched system-specific guides in the huge Brooklyn, Queens and Staten Island boroughs of New York, just as they were being wired.

TV Guide Tactics

TV Guide is now expanding aggressively into cable systems. But the giant weekly, which Rupert Murdoch bought for $3 billion two years ago, received a setback when Times Mirror in Phoenix recently scrapped well-developed plans to use *TV Guide* in favor of picking up *TV Time.*

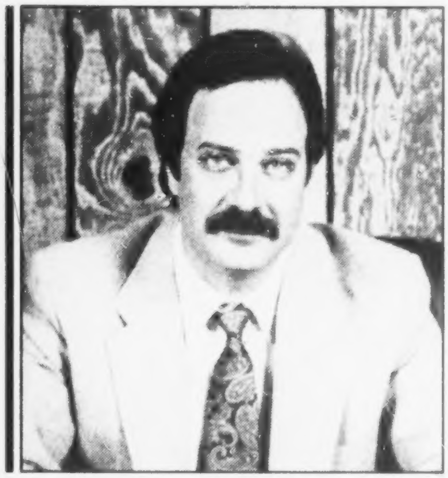
"When it was time to renew the relationship, we looked at other things out there," Gregg recalls. On March 31, Times Mirror launched *TV Time* in Glendale, a Phoenix suburb, to a "terrific response," Gregg says, "partly because there wasn't a guide available."

"Obviously, we're disappointed," admits *TV Guide* President Joseph Cece about losing Phoenix, where *TV Guide*'s entry had been heavily promoted prior to Times Mirror's sudden switch to *TV Times.* "The way *TV Times* was introduced into the system, we think, leaves something to be desired."

Because of increased competition, TVSM will no longer announce its new markets prior to launching in them. "It doesn't make sense for me to reveal my marketing so they can go around throwing marbles on the floor," Wragg says.

Broadcast Bias?

Certainly, *TV Guide* is the better known of the two. But that cuts both ways. *TV Guide* has to persuade operators that it isn't a broadcasting organ. Executives at Premium Channels, which publishes guides to pay services, maintain that *TV Guide* has featured pay cable programs on only



System-specific guides are in, advocates *TV Host* president David Stefanic

two of its covers.

Cece counters that *TV Guide* offers more complete cable listings than *TV Time.* "Despite *TV Time*' being touted as a cable book, we do a much better job on cable than they do." *TV Guide* listings, he adds, include content descriptions. *TV Time*, Cece insists, is "very poor on basic cable, contrary to the myth they like to perpetrate."

In New York City neighborhoods, *TV Guide* offers a "rolling grid" in the log that places channels in two separate systems. As a newsstand-based publication, it is locked into a market-specific listing only. Cece maintains that it is more important to be informative than system specific. "People don't go to a TV set and say, I'm going to watch cable TV tonight."

"We love to do it in major markets where there is a large enough base for cable systems that have aligned numbers," he says. "But if somebody thinks the Holy Grail is channel specificity, he's missing the point."

Being system-specific can get expensive. Manhattan Cable already must send out two guides: one for rebuild areas, and another for older channel capacity customers.

Cece does not believe it is not economically feasible to publish for less than 30,000 circulation. But James Mazzocchi, publisher of *Cable Viewer* in Holyoke, Mass., sends out system-specific guides to systems as small as 3,000 subscribers for only 60 cents per copy.

Grids Get Giantic

Regardless of frequency, increased channel capacity is beginning to make complicated grid schedules resemble computer printouts. "Monthly guides are diluted," says Richard Wilen, whose *Premium Channels* is a freestanding pay guide most often inserted into monthly billing statements. "They're a bigger package, but they're filled with air. The customer is not finding the information he wants."

Even Wragg admits that eventually, "We're going to have to be selective. We're able to do 40 channels," Wragg says, "not 108". Only three systems, all in the New York area, now receive a free, monthly guide that includes all of the basic channels as well as pay. In April, this guide contained 216 pages of program information. *TV Guide* is looking into a larger format to accommodate more channels, Cece adds.

Cable channels themselves are doing a better job of sending out program information to interested viewers. A&E, TNN, Discovery, Movietime, ESPN and MTV now put out monthly channel guides, with Nickelodeon following this summer and others looking into it.

These publications have evolved into full-fledged magazine guides. A&E's guide, over three years old, expanded into a magazine with national ads and features last June. Although Paulette McLeon, *A&E Guide*'s editor, admits that it is supplementary to other guides, it offers more comprehensive program information. Besides, *TV Guide* won't even list a basic cable network unless it breaks 50 percent penetration in a market area.

On-Air Alternatives

On-air guides like The Weather Channel's Prime Time Tonight offer viewers another alternative to guides. Prime Time Tonight has grown to 7 million by March. Unlike a rolling grid, it has the advantage of not taking up a channel slot, since it tags along the weather reports every half-hour.

On-air guides are useful for grazing, according to Jim Humphreys, general manager of Prime Time Tonight, and so reach younger viewers. His service appeals to the "spontaneous nature of viewers zapping around." He compares it favorably to rolling grids: "We catch them when they're ready to decide."

Premium Channels experimented with a VCR-oriented magazine in 1987 to facilitate a viewer's recording schedule. The reader could take out a stamp and affix it to a fold-out

GUIDE GAME'S MAJOR PLAYERS

	Circulation	Frequency
TV Guide	16.4 million	weekly
TVSM	11.3 million	monthly/weekly
Cableview	8.0 million	montly
Premium Channels	4.1 million	monthly
TV Host	2.3 million	monthly/twice-monthly/weekly

> 'Monthly guides are a bigger package, but they're filled with air. The customer is not finding the information he wants.'
>
> *— Premium Channels publisher Richard Wilen*

calendar. Executive vice president Steve Goldmintz attributes its failure to technical and logistical problems; Wilen says the industry itself protested and the public was apathetic about recording.

Supplements Still Challenge

Since most cable subscribers get a metropolitan Sunday paper, TV logs in newspapers present a very real challenge to the paid weeklies, especially since they come "free" with the paper. To increase their attractiveness to national cable advertisers, newspapers recently agreed to adopt six standard sizes for TV log ads.

"Yes, we're in competition with them," the Newspaper Advertising Bureau's Kinsolving says of the cable guides. An NAB survey showed that in 88 percent of surveyed households, the Sunday supplement "sits on the TV set until next week."

Jones Intercable in Denver works with, not against, newspaper logs. "In markets where there is no good local guide through the newspaper, we offer our guide," says John Mathwick, group vice president. "It's market-driven. If there's a good newspaper log, we go along with it. It's allowed us to back away from pushing the guide business."

The nation's largest cable system began its own weekly guide in 1987 just as the dominant local newspaper began its highly successful Sunday insert. Long Island's Cablevision and *Newsday* were originally meant to be partners. But Cablevision

> 'All of a sudden, the industry recognizes they need system-specific guides. Why? The hype flattened out.'
>
> *— TV Host president David Stefanic*

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snatched away *Newsday*'s TV editor and a respected TV critic.

Newsday responded by printing its log with a glossy cover to make it look more like ~~a~~ magazine, a highly unusual move for a daily that owns its own press. 'It is tough road to plow, getting people to pay for a weekly book,' admits Maggie Melluso, *Total Television*'s editor.

Newsday's $1.25 price compares favorably with $2.95 a month ($3.85 for systems outside of Long Island) for *Total Television*. On the other hand, *Newsday* is not system-specific for cable channels.

Today, Cablevision's *Total* reaches 140,000 subscribers in three systems, including other Metro New York systems, while *Newsday's TV Plus* goes to its 700,000 Sunday subscribers. *Newsday*, however, is not system-specific.

Monthlies are "diluted," acccording to Premium Channels publisher Richard Wilen

Small Players, Big Business

In other markets, local guides have the firmly entrenched loyalty of local operators. *Cableviews*, for example, is a 65,000-paid-circulation weekly that goes out to three major cable systems in Cleveland. In fact, it outsells *TV Guide* two-to-one in that market, according to *Cableview* publisher Tim Veleck. Even more unusual for a system-specific guide, 65 percent of sales are newsstand, with only 45 percent from subscriptions. "*TV Time* is not a problem for me, because I have been entrenched in the marketplace for a while," he says.

With weeklies increasing advertising and subscription revenue, other publishers may enter the field. Wilen, for example, tried a weekly during the *TV Cable Week* fiasco, but says he's "talking to people about doing weeklies right now." ■

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Back in *1966*, March 17th to be exact, *TV HOST, INC.* launched the very first *WEEKLY CABLE GUIDE* in Harrisburg, Pennsylvania. This weekly guide was totally subscriber and advertising supported then as it continues to be today. It was a major innovation of its time, not flashy — just practical, affordable and complementary to the new industry it served.

In July *1981, TV HOST* launched a new magazine-sized *MONTHLY PROGRAM GUIDE* offering premium and satellite programming consolidated in one easy-to-use format.

In April *1988*, the first multichannel *PAY-PER-VIEW GUIDE* was published for operators offering several different pay-per-view services in their systems.

In December *1988, TV HOST* purchased TV Listing Group, Inc., a national distributor of *TELEVISION PROGRAM LISTINGS*. TV Listing's extensive programming database provides television listings throughout North America. This enables *TV HOST* to provide even more accurate listings while maintaining the commitment to producing an excellent program guide.

On November 1, *1989, TV HOST* published a brand new *TWICE MONTHLY* frequency cable and broadcast-complete magazine for cable viewers. Again, it's a totally new concept, supported by subscriptions and advertising. Why twice monthly? Because it is a better answer to the needs of today's cable subscriber and the cable operator.

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Nearly 40 percent of systems offer PPV, but few use impulse ordering technology

by Kathy Haley

Pay-per-view continues to grow, but use of barker channels, considered critical to aggressive marketing, has fallen some since a year ago. According to a survey of cable operators conducted in early February, CSRs handle the orders in nearly 60 percent of the systems offering PPV.

The survey, commissioned by *CableVision* and Midwest CATV, found that 37 percent of the 396 reporting systems now offer PPV. It also found that the bigger the market, the more likely it is to have PPV available. While 72 percent of responding systems serving more than 50,000 subscribers offer PPV, only 21 percent of those serving fewer than 10,000 subs do so. Fifty-four percent of systems serving between 10,000 and 50,000 subs offer PPV.

Number

4

in a series of eight

But while PPV is up nine percentage points from a year ago, use of barker channels, which many PPV marketers maintain is their most important tool, is down. Only 49 percent of reporting systems use a barker channel, compared with 58 percent in early 1989.

Sporting events remain the big draw in PPV, according to survey respondents, 81 percent of whom said sports drew the biggest buy rates. In fact, sports gained some in its lead over other programming categories from last year's survey, when 64 percent of respondents reported sports as their best seller.

Movies drew the second most votes for best programming type. Sixteen percent of operators ranked it their hottest seller, down from 35 percent in 1989. Concerts earned no votes for best programming category.

When it comes to taking orders for PPV, only 14 percent of those surveyed are using impulse technology. Another 18 percent use automated number identification systems (ANI) and 59 percent use their customer service representatives.

Systems with fewer than 10,000 subs reported the most use of CSRs for order taking. While 79 percent of those use CSRs, 2 percent use ANI and 7 percent use impulse. Among systems serving between 10,000 and 50,000 subs, 57 percent use CSRs, 23 percent use ANI and 15 percent use impulse.

Thirty percent of systems serving more than 50,000 homes use CSRs while 35 percent use ANI and 17 percent use impulse.

Of the 63 percent of systems that do not offer PPV, 32 percent told the Cable Poll™ survey they are "technologically incapable" of doing so. Another 17 percent claimed it would "not be profitable" to do so and 26 percent said the hardware necessary "is too expensive." While 29 percent of small systems gave expense as their reason for not offering PPV, none of the systems serving more than 50,000 subscribers offered that as their reason for not doing so. Among the biggest systems, 14 percent said they are technologically incapable of offering PPV while another 14 percent claimed it would not be profitable. ■

Does your system own a barker channel?

	Total	Less 10K	10K -50K	Over 50K
Total	386	203	137	32
Yes	193	75	79	25
No	171	104	54	5
Don't Know	32	24	4	2

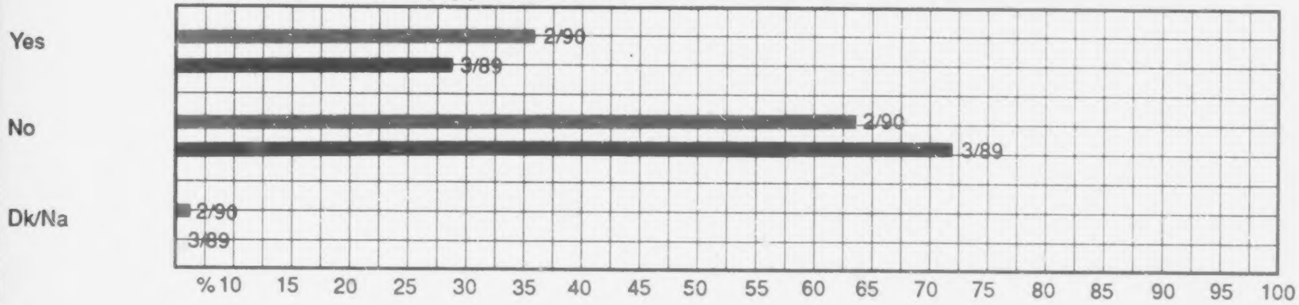
Does your system offer a pay-per-view-service

	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
Yes	148	43	74	23
No	245	159	63	7
Don't Know	3	1	0	2

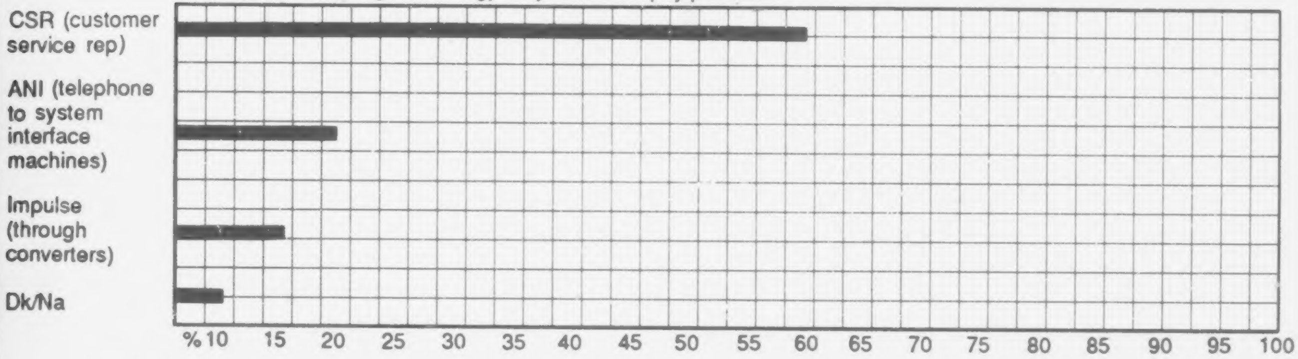
HOW THE POLL WAS CONDUCTED: The Cable Poll™ is conducted for Midwest CATV and *CableVision* magazine by Ryan/Samples Research Inc. Telephone interviews for this edition of the poll were conducted Feb. 1-15 with a random sample of 396 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points.

Adding up your answers:

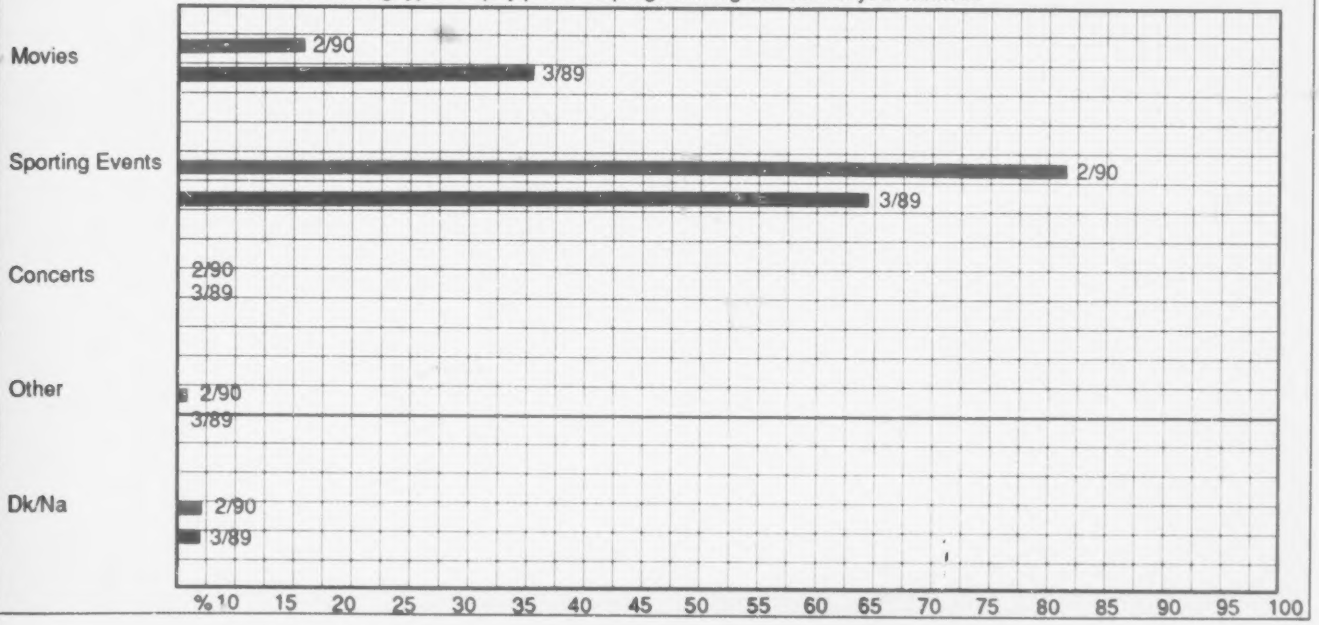
Does your system offer a pay-per-view service?



What type of ordering technology do you use for pay-per-view?



Which of the following types of pay-per-view programming sell best in your market?



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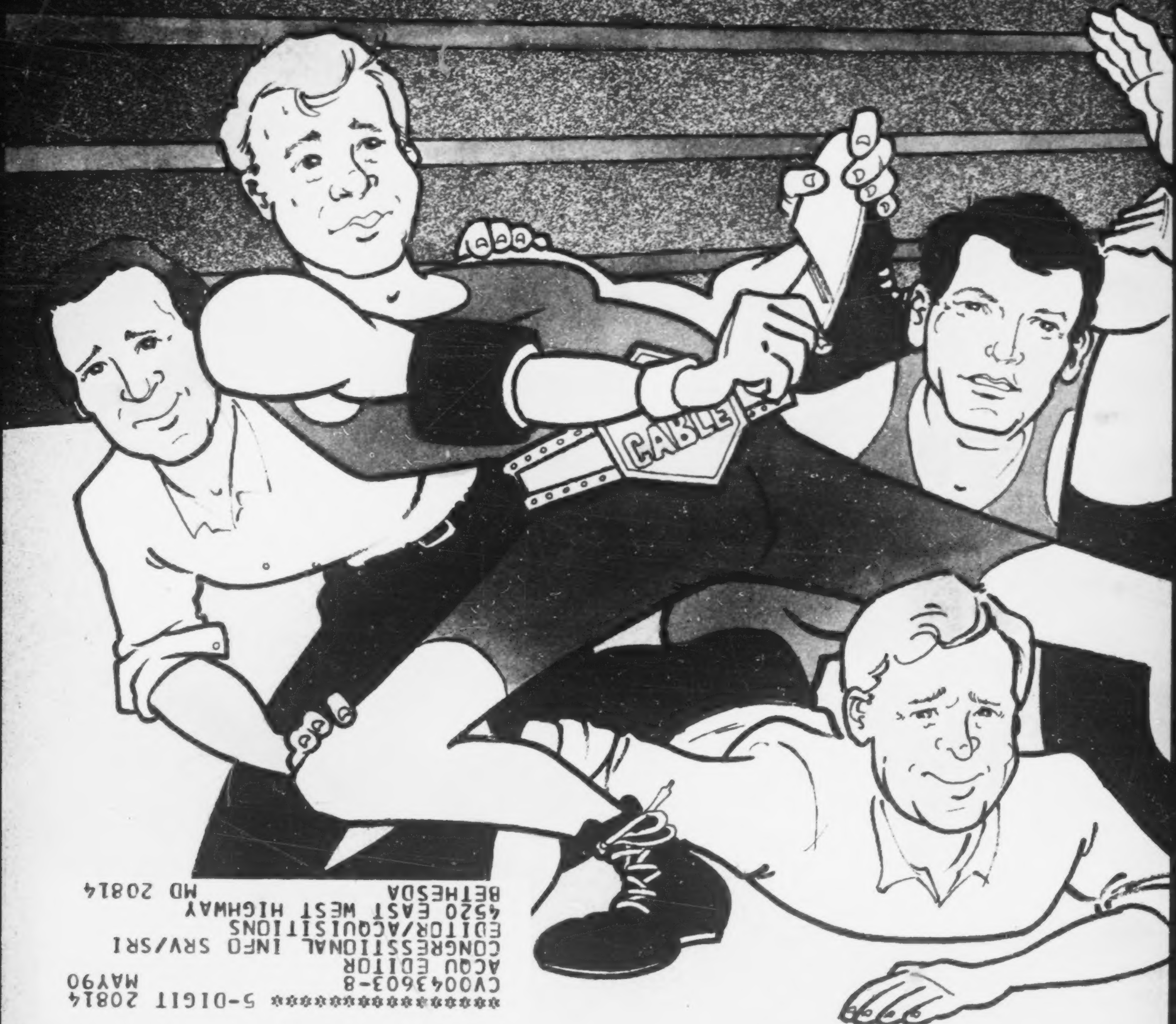

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IS CABLE LOSING ITS MUSCLE?

Cable

INFORMATION AND ANALYSIS FOR CABLE TELEV

FEATURES

PROGRAMMING 54

CNN GAMBLE NOW GOLD

Ted Turner may have started it for "the hell of it," but 10 years later, his 24-hour news hunch is a global business, writes Richard Tedesco.

POLICY 68

A CHAIRMAN REFLECTS

Robert Miron talks about what NCTA has accomplished during his administration in a question-and-answer interview.

ADVERTISING 80

THE NEW YORK EXPERIENCE

Joe Terranova paints the big picture behind the move to interconnect the Big Apple.

COVER STORY

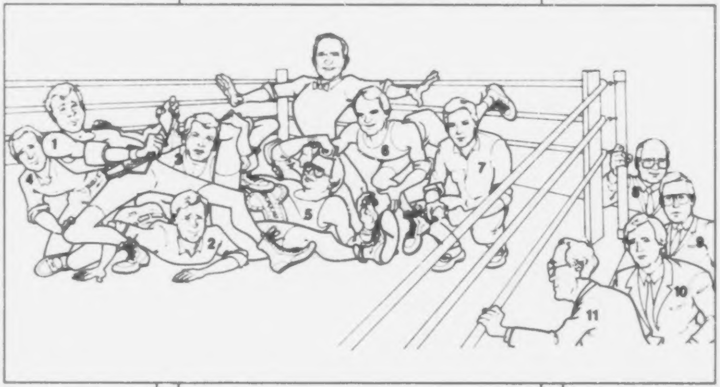


ILLUSTRATION BY CHRISTOPHER KAMMERER

Who's Who on the cover: 1) Jim Mooney; 2) Amos Hostetter; 3) John Malone; 4) Steve Effros; 5) Eddie Fritts; 6) Jack Valenti; 7) Sen. Albert Gore; 8) Rep. John Dingell; 9) Al Sikes; 10) Rep. Ed Markey; 11) Sen. Howard Metzenbaum

LOBBY LOGJAM 24

Cable, the reigning champ of grass roots influence, will soon face its biggest match yet, writes Howard Fields

ADVERTISING 88

TODAY I AM A CABLE NETWORK

Nielsen's rite-of passage nearer than program services let on, reports Joe Terranova

TECHNOLOGY 94

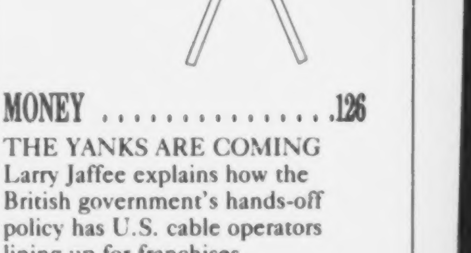
COMPETITIVE LANDSCAPE CHANGING

The cable industry most likely will have some multichannel competitors in the 21st century. Gary Kim outlines how DBS, MMDS and possibly, telcos could give cable a run for its money.

INTERNATIONAL 104

A NEW BRITISH INVASION

American cable networks are helping BBC Lionheart crack the U.S. market in a big way, writes Richard Tedesco



MONEY 126

THE YANKS ARE COMING

Larry Jaffee explains how the British government's hands-off policy has U.S. cable operators lining up for franchises.

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MANAGEMENT MAY 21, 1990

DEPARTMENTS

BETWEEN THE LINES 12

TCI GOES ECONOMY
Biggest MSO plans to test low-priced basic tier

SIMMONS STORMS DC
Cable entrepreneur lobbies Senate, executive branch to head off reregulation efforts

METER BENEFICIARY
Nielsen to meter San Antonio in fall; KBLCOM only U.S. system with daypart, demo data

PRIME DARES FCC
MSO not paying $18,000 fine for alleged EEO violations; agency must take company to court if it wants to collect

TNT TAKEBACK
On the heels of an announced reduction in NBA ads, TNT is taking back more time

INTERACTIVE CABLE SERVICES
ACTV and GTE's Main Street are gaining momentum for broadscale launches from recent system tests

MOVIETIME NOW E!
$43 million committed to revamped network's relaunch; broadens entertainment mission

FORUM 114

TWO-WAY TODAY
Consultant calls for telcos, cable to bring interactivity a la France's Minitel system

OPERATORS' HANDBOOK

Keeping Subs Happy 119
Day-in-the-life series continues with profile on Philly system's CSRs

Reversing Poor Image 122
Paragon's northeast division tries to rid itself of bad community feelings

Greater Media CSR Cheryl Curtin

CALENDAR 140
Canadian Cable TV confab in Edmonton is this issue's main event

DATABASE 142
Announced programming nets; ppv service profiles; TV household profile

DATABASE 145
The latest top 100 MSO and system counts

CABLE POLL 146

REDESIGNED TO REREGULATION
Basic rate controls would dent, not cripple, profits; 45% predict legislation, according to survey

PARTING WORDS 156

HERE, THERE AND ACROSS
If-carry/must-pay plan fizzles; local programming not as sexy as global revolution; Family Channel's *Across Five Aprils* overlooked programming jewel

Family Channel's
Across Five Aprils

CHANNEL HOPPING 148

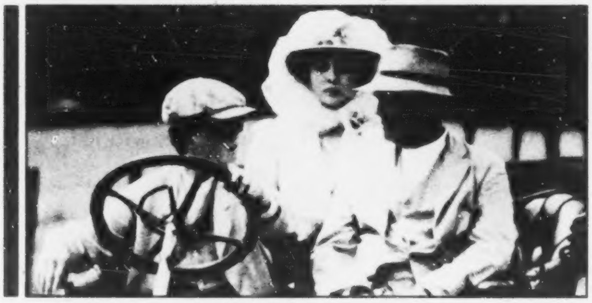
PEOPLE 150

CLASSIFIED 152

ADVERTISERS INDEX 153

COMPANY INDEX 154

KBL-TV Sees Advertising Sales Boom In Nielsen Metering of San Antonio



KBL-TV will look for big Nielsens off TNT flicks this fall

San Antonio is about to make cable ratings history. Local operator Paragon Cable will soon be the only cable system in the country with access to ratings by daypart and demographic for cable households when A.C. Nielsen makes San Antonio a metered market this fall.

KBL-TV, a subsidiary of parent KBLCOM and the local advertising arm of Paragon, will participate in the metering effort with three commercial stations in the market. That also sets a precedent, as KBL-TV will be kicking in $2.5 million toward the cost of metering over the next seven years.

"It's the first time cable has been treated as a full-fledged partner," says Chancey Blackburn, KBL-TV gm.

Paragon's San Antonio system, the nation's fourth largest, boasts a 64 percent penetration rate (368,000 households) in what is the 42nd DMA. (That will make it Nielsen's smallest metered market).

Nielsen will make quarter-hour and cable demos available in special reports to KBL-TV. "For future reference, this is going to revolutionize cable sales," says Blackburn. She conservatively projects 30 percent growth in local ad sales over the next five years. KBL-TV could hit $5 million in sales this year on the 16 channels where it inserts spots, putting it past sales for Univision affiliate KWEX-TV and KABB-TV, one of two indies in the market.

Blackburn says KBL-TV was sold on metering by a Nielsen report showing cumulative increases for basic cable networks of 40 to 150 percent in several markets, including Minneapolis, St. Louis and Tampa, after metering.

Diary ratings typically under-report cable viewing in early and late fringe, prime access and daytime.

In sports-conscious south Texas, NFL games on ESPN and TNT will score strong numbers along with ESPN's Major League Baseball. KBL-TV figures movies on TNT and USA will draw in prime time along with specials on The Discovery Channel.

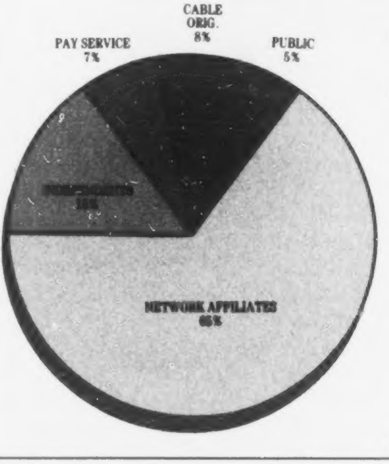
"More and more, we're able to compete with the broadcast networks' prime time programming," Blackburn says.

KBL-TV figures USA Network, ESPN, TNT, Nickelodeon and Home Sports Entertainment will all come big in the Nielsen numbers beginning this fall. One San Antonio Spurs game on HSE this season drew the equivalent of an 8.1 rating in cable households, according to a phone coincidental survey. Interestingly, HBO draws a prime time rating equal to local indies among San Antonio viewers in Nielsen diaries now.

"From our point of view," says Blackburn, "the big three will become the big four."

—Richard Tedesco

WHAT DO VCR HOUSEHOLDS RECORD?



Top Recorded Programs During November 1989

Rank	Program	Network	VCR Households
1	Small Sacrifices Pt. 2	ABC	1,565,700
2	Till We Meet Again Pt. 2	CBS	1,197,300
3	ABC Sunday Night Movie	ABC	828,900
4	CBS Sunday Movie	CBS	828,900
5	NBC Sunday Night Movie	NBC	828,900
6	All My Children	ABC	736,800
7	General Hospital	ABC	736,800
8	Barbara Walters Special	ABC	644,700
9	LA L[illegible]	NBC	644,700
10	Roseanne	ABC	644,700
11	CBS Special Movie—Mon.	CBS	644,700
12	NBC Monday Night Movies	NBC	644,700
13	Days of Our Lives	NBC	644,700

Source: Nielsen Media Research

Indians on TNT

Ted Turner just keeps generating ideas being translated into on-screen projects.

His latest concept is a lengthy dramatic mini-series on the American Indian. "It's an idea Ted is really intereated in," says Scott Sassa, TNT executive vp.

The planned 20-hour project, currently in development, is still two or three years away from air on TNT. *—R.T.*

1983-1984

KEY LAWMAKERS	NCTA	NAB	INTV
Hollings (Pres.)	2,000	3,000	
Hollings (Sen.)	3,000		
Exon	1,000	2,000	
Gore (Sen. race)	2,000	2,000	250
Gore (House race)			250
Gorton	3,000		
Pressler	5,000	2,000	
Stevens	3,000	1,500	
Bates	3,500	600	250
Bliley	3,000	1,000	
Boucher	500		
Bryant		850	250
Collins	750	1,000	
Dingell	3,050	2,000	500
Eckart	1,200	850	250
Fields	3,000	850	250
Leland	3,000	500	250
Lent		500	
Markey	1,000	250	
Moorhead	1,500	1,000	250
Nielson	2,000	500	
Oxley	3,500	1,500	
Rinaldo	2,250	3,000	500
Ritter	3,000	1,000	300
Scheuer	1,000	200	
Swift	7,000	2,250	1,500
Tauke		2,500	250
Tauzin	3,000	2,000	250
Wirth			1,000
Wyden	2,000	750	
Total contributions to all candidates:			
Democrats	142,900	59,925	6,650
Republicans	85,300	75,950	4,175

1989-1990 (1st Quarter)

KEY LAWMAKERS	NCTA	NAB	INTV
Exon	10,000	3,000	
Gore			5,000
Gorton		1,000	
Hollings		5,000	2,000
Packwood	120		
Pressler	2,000		
Stevens	4,999		
Tauke (Sen. race)		5,353	
Bliley	5,000	1,200	
Boucher		2,400	850
Bryant	2,000	700	1,500
Collins	1,000		
Dingell	5,000	1,000	1,000
Eckart	5,000	800	
Fields	3,000	500	
Leland	1,000	500	500
Lent	5,500		
McMillen	1,000		
Moorhead	4,000	1,100	500
Oxley	700		
Rinaldo	5,000	1,200	300
Ritter	5,000	300	
Schaefer	5,000	1,350	
Scheuer	2,000		
Swift	1,350	1,700	700
Tauzin	2,000	1,500	
Wyden	2,500	1,600	
Total contributions to all candidates:			
Democrats	182,200	73,475	16,550
Republicans	119,475	78,353	4,300

TV Interest Groups Grease The Palms

Just about all lobbying groups (CATA is one exception) have taken on as part of their responsibility the funneling of contributions to political candidates. The three main players in the tv industry do so under the aegis of political action committees with names like Cablepac, Tarpac and INTVpac.

Decisions on how much to give to key member of Congress are based on many factors. The money may go to someone who has been a friend of the industry in the past, someone the group wants to win as a friend for the future, or even someone who is a special friend of an association president or of an industry leader.

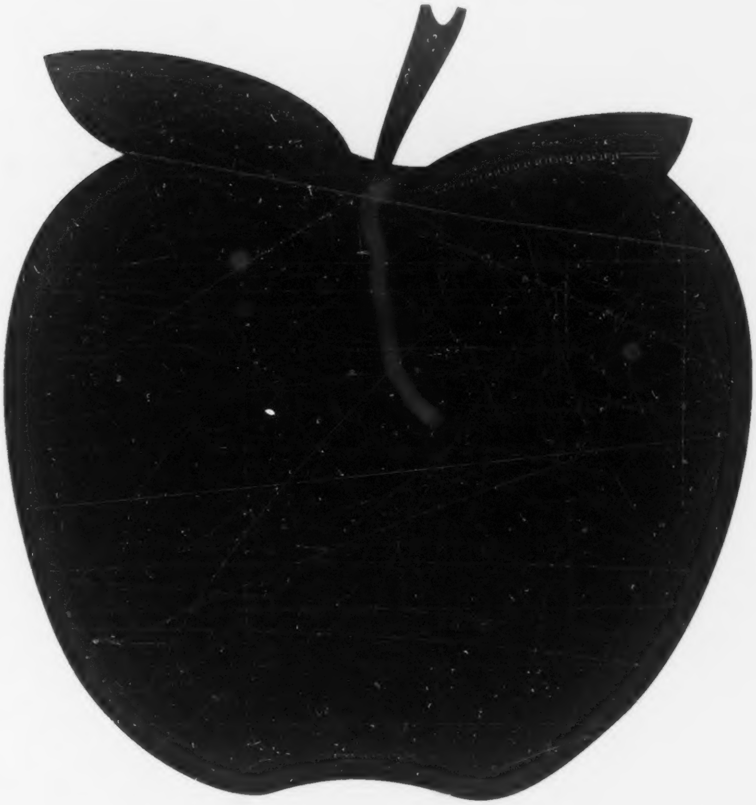
Associations also have other ways of getting money to members of Congress, such as honoraria, which do not show up on campaign reports.

The following table, compiled from Federal Elections Commission reports, lists only members who now serve or did serve at the time on communications panels in the House and the Senate. It demonstrates that the cable industry put much more money into contributions than did broadcasters during the years involved. NAB President Eddie Fritts acknowledged in an interview that "Our guys are late coming to the party on that." ■

The New York Experience

Tracing the trials and tribulations of interconnecting advertising's capital city

By Joe Terranova



It's been characterized as reinventing the wheel, creating a better mousetrap, controlling one's destiny and stabbing your peers in the back. Two-thirds of New York operators recently plunked down a total of about $120,000 to study the feasibility of a marketwide advertising interconnect. And while the results won't be known for six to eight weeks, the process bears watching.

The casual reader of CAB literature might think New York already has an interconnect, and in a sense, it does. Cable Networks Inc., a division of Rainbow Advertising Sales (RASCO) which is owned by Cablevision Systems, represents virtually all of the ADI to regional cable advertisers. It does so, however, without dedicated inventory or control over pricing, and with lots of bicycled tapes. There's even a conflict-of-interest cloud hanging over its head.

Cablevision is the area's largest MSO, and RASCO sells time on Cablevision's regional net SportsChannel. But both conditions existed long before Cablevision purchased CNI from 3M three years ago and brought the market together under RASCO. And while making other operators uneasy, Cablevision's influence in the New York ad market was never a cause worth spending thousands, maybe millions, of dollars to rectify. Until now.

With one fell swoop, the Time Warner merger put it on equal footing with Cablevision in New York. A more gradual change has been systems' growing ad sales sophistication. Finally, other interconnects have been gaining ground on New York, both in the headlines and on the ledger sheets.

That last item may have been the flashpoint for years of brewing mistrust. What others initially poked fun at as "star wars"—satellite spot delivery—may be turning into a money tree for Adlink, managing partner of the Los Angeles interconnect. The Greater Philadelphia Cable Interconnect is weighing a similar move, but the Bay Area Interconnect has also prospered with its switch from microwave to low-tech bicycling.

The most obvious trait these and other blossoming interconnects share is equity participation among operators. Without it, New Yorkers are left to fantasize about lost financial opportunities. By various accounts now a $40 million market, New York is said to have the potential of reaching $75-175 million in annual cable ad sales revenue, depending on who's wearing the turban.

Under that kind of greenback-induced high, the market's current arrangement with CNI is pure Near Beer. "Anybody can hire a sales manager and 12 salesmen for $2.8 million a year," pans one outside observer. (That's figuring a 25 percent rep fee on $13 million in gross regional sales after agency commission.) But one insider points out that area tv stations and systems do earn about the same percentage of their total ad revenues—30 and 5-40 percent respectively—from national sales. Conceding this may be the natural order of things, he adds: "What do these cable wizards know that can change that?"

A *New* New York Interconnect?

The players at a glance	Subs (000)	% of Cable Ad HH
Cablevision Systems	853	27
Time Warner (Paragon)	673	21
UA Entertainment	321	10
Maclean Hunter	239	7
TKR	230	7
Comcast	226	7
Monmouth/Riverview Cable	122	4
Adelphia	88	3
C-Tec	88	3
Sammons	86	3
Colony	68	2
Cablevision Industries	65	2
Continental	53	2
TOTAL	**3,112**	**98**

Source: CNI

Predictions from both sides seem based on some potentially misleading assumptions. One is that regional is just a bigger version of local sales. As someone who has had more than his share of disappointments with interconnects recounts, "It's a totally different business. To be in it, you need to chuck out over 25 percent of your inventory. And say goodbye—don't get involved in analyzing regional on a local pro forma basis. Because at that point, you're not a geo-targeting narrowcaster any more. You're a broadcaster."

The implications here are frighteningly literal, and several New York operators (C-Tec, Sammons, Cablevision Ind., Continental and Maclean Hunter's Jersey City system) have excused themselves from the conversation and the four cent fee asked to finance the Malarkey Taylor/Thom McKinney study.

The characteristics of any market make some franchise areas more valuable than others, but few can compare with New York's diversities.

"I don't think the outlying areas are going to get national dollars whether they're part of a hard interconnect or not," remarks one dissenter. If so, the $25-60,000 cost per insertion point (over 60 in the ADI) for groundbased satellite equipment is a poor return-on-investment. But ironically, with the next breath, that same sales director reports 15 percent of his revenues in national business. An additional 5 percent could easily pay for the hardware in six months.

The real concern here is the other 85 percent of his business: "The local market is where I make most of my money and where I should put my best foot forward." For this sales director and others, regional advertising has come to mean low rates and premium inventory plus agency and rep commissions when local sales are growing at 20-30 percent.

However, operators' incentive to turn some of this money-in-hand into seed might be that they're going to run out of business. "There are only so many people who are going to buy just one system," cautions CAB vp of local sales Ron Fischmann. "When they find they've hit the wall with price increases to their car dealers, then systems will wish they'd taken some of that inventory and established their agency business," seconds Dave Bender, chairman of the research firm Bruskin & Associates.

For operators who see this as gas-war pricing in a boom, Sue Schmalzbach, sales director for national rep NCA's New York office, assures them: "Price is becoming secondary to systems executing schedules as they are ordered. If you have 20-30 systems that are part of a soft interconnect, the likelihood of running into a scheduling problem is far greater than the same schedule run on a hard interconnect."

Still, it's a mistake to think improved delivery and verification will be the only holes your money will drop into in the beginning, warns JWT senior vp Jean Pool. She advocates two rate cards, one giving a discount to regional clients and another offering zones or the interconnect to national advertisers.

Those attending April's CAB convention will remember Pool's if-it-looks-like-a-duck comparison of cable and broadcast sales, which was met by a chorus of "we're not ducks."

The condition Pool describes, a dual rate card, seems to be already happening in Los Angeles. ("Local cost has nothing to do with what regional time will go for," agrees Adlink president Alan McGlade.) But Bill Wiener, of Advertising & Media Advisors, doesn't give it much chance of spreading quickly.

"On a local basis, cable operators have become very smart marketers, competing aggressively against radio and newspapers," says Wiener. As a result, he scoffs, "Anyone who looks at this $1-billion tv market and wonders why cable's only getting $13 million is kidding himself [because] the pricing is completely out of whack."

1990 Regional $$$ Per Insertable HH

Interconnect	Regional Sales (000,000)	Cable Ad HH (000)	$ Per Sub/Yr.
Boston	2	1,032	1.92
New York*	13*	3,210	4.05
Philadelphia (GPCI)	5.6*	1,200	4.66
Los Angeles	7	1,350	5.19
San Francisco	8	1,050	7.62

Source: Interconnects, *Paul Kagan Assoc.

Surprisingly—or not, depending on how well you know him—BAI president Bill Stanfield concedes that, in the past, "We've increased our rates, sometimes with no methodology and sometimes pretty outrageously." Instead of two rate cards, he sees "ESPN, TNT and CNN becoming so valuable that smaller clients are not able to afford them." Those will provide the broad cpms he'll need when wearing his whole market, broadcasting hat for agencies. Then his staff can match smaller advertisers with smaller nets.

Going Soft

If New York operators learn anything from their study, Stanfield hopes it's the importance of zone sales. Two years ago, BAI went soft when covering the remainder of the market via microwave and installing addressable headends were judged to be cost prohibitive. Bicycling now allows advertisers to choose between eight trading zones and the whole interconnect. As a result, 41 percent of his local and 13 percent of his national business are zone buys, with overall gross up 100 percent.

Conversely, about 400 miles to the south, "If an operator wants to buy two or three systems, we just send them to the systems," explains Adlink's McGlade. "That's why you have local sales staffs."

In McGlade's case, God knows, it's not a hardware shortcoming. His systems will gradually upgrade to 13-channel insertion capability beginning in August. And, if he only had a full-time transponder (annual cost: $800,000-$1.6 million), those addressable headends could accept real-time insertion. (As it stands now, he rents a couple of hours weekly on the bird at $500 a pop.)

Others say that McGlade is motivated by politics—even with equity, he must keep off local sales managers' toes. And while BAI's Stanfield calls McGlade a pioneer, he also suggests the zone business isn't worth McGlade's time, and shakes his head "over how many local sales dollars are lying under all those rocks." Furthermore, with 40 L.A. systems doing $500,000 each and McGlade another $10 million in regional sales, he adds, "You have a $30-million market and over 200 salespeople. How terribly inefficient."

Lost Valley

Maybe. But unless you're working out of a market where there are no local sales operations—let's call it The Lost Valley—it's unlikely that most systems would consolidate their ad staffs. BAI, Seattle's Northwest Cable Advertising, the Dallas interconnect (exhumed under Cable AdNet) and the new operator-owned Atlanta interconnect all pre-date the normal system-level evolution. Up until Wometco and Prime took over Atlanta from CNI a couple of months ago, there wasn't one system employee selling time in the market, according to local manager Jon Ozor.

With New York and all its fully-developed personalities, an integrated sales team seems as much a prospect as world government. But another sales director wonders why, if the aforementioned interconnects are such good models, those involved who also have properties in the market (Colony, Continental, Comcast, Sammons and UA) "aren't pointing to them?" Then he answers his own question: "Because we want to be the best."

For example, dedicated inventory and pricing flexibility are usually the two biggest points of contention between systems and regional managers—whether there is shared equity or not—and one of the first things that every successful interconnect points to as the reason for its success. Yet this sales director is not sure it's necessary in these days of "instant communication."

The Plot Thickens

This is presumably a reference to a program like CNI's OSCAR, an accounts receivable system now in development and said to be capable of online trafficking. Of this last idea, another New York sales director who is an Adlink partner remarks, "I don't like turning over inventory, but online control is difficult to do." He is not alone, and this may be the first chink in Adlink's armor, just as it may be the seed that develops into the tree dividing NY operators.

In its second year of operation, Adlink now takes 25 percent of the inventory from affiliates' top five networks. What it can't sell, it turns back. But as it becomes more successful, it's going to want more time, and Stanfield predicts this will be a constant struggle as Adlink seeks its stride. And it has equity! What chance does CNI or any rep have of getting the things it needs to tend its business?

For his part, McGlade suggests that New Yorkers' criticisms of interconnects are better directed at repped markets. *His* inventory (you know it must hurt some people to see that black and white) runs across all dayparts, "Whereas in a rep situation, the tendency is to just turn over primetime orders."

Reps in general seem to agree that systems' involvement with interconnects is a function of ad sales maturity and that owning a piece of one doesn't speed the process. An outside operator who participated in a failed equity-based interconnect concurs. "I don't think there's anything magic about equity *or* third-party deals. You need people with a consistency of thought, a common objective and without hidden agendas. A good contract with a third party is a great way to go."

With that as a yardstick, it's surprising regional sales in New York work as well as they do now. Dispelling any notion of like-mindedness, one insider admits, "We've got 16 different operators and 16 different opinions." And this market has more inconspicuous airport runways than it does "hidden" agendas. The only common objective—profit motive—is *too* common to base a partnership on. But that may not stop ops from trying, a fact which reps seem to sense.

Through kicks and screams, a resolve can be heard in reps' voices as they discuss the shifting control of interconnects they may have built. (Look at Atlanta, where operators brought the interconnect, and in the process, CNI insertion equipment, in-house). The rep for a top-10 interconnect underscores the role reps have played in developing regional markets: "I was ready before they were." Then he adds the standard rep refrain, "And those systems have earned net operating income on sales from day one."

For those reasons, another rep suggests New York operators have "the best deal going" with CNI and that the market's uneven development makes an equity-based interconnect unlikely. "You've got some operators doing $28-29 per sub, while others are at $8-9. There are some people out there just doing it better than other guys."

While an evenly developed market may be ideal, most agree it's also unrealistic. But one New York sales director suggests it may be a moot point. "I'm not sure CNI is the intended player here."

Conversely, two New York operators not participating in the study believe CNI should have to foot the bill for it and maybe, ultimately, the building of a hard interconnect. (They were obviously not in the majority, since CNI was not approached about doing either.) Adds one, "If operators aren't happy with the company repping them, then they should sit down and work out a way for them to do a better job. It would be a hell of a lot easier and less expensive to turn CNI around than to reinvent this thing."

At least New Yorkers seem to agree that zone sales are critical and that likely divisions include metro, Long Island, mid-Hudson Valley, Westchester and Fairfield Counties, and northern/central/southern New Jersey. That's assuming all those areas participate in any future developments.

"If we find there's a vote taken and it's a split market, for us to come in at that point we'd have to decide whether we'd want to make some of our inventory available at a lower rate," offers one study participant. "It has to be a win-win situation. Otherwise, we're out."

Most outsiders seem to agree that the split market scenario is worst case. Obviously, Time Warner's interconnect of its Manhattan and Brooklyn/Queens properties is a go regardless. And Cablevision is not about to give up on regional business, whether it's the whole ADI or not.

"I don't think even the biggest companies will be able to maximize their potential if they play it alone," comments an executive of one big company. "It's hard for me to believe people could be stupid enough not to understand that." Another sizes things up this way: "You've got a couple of big players, then there's the rest of us. So it's going to be difficult to come to a unanimous decision. But I think we'll get there."

Citing a laundry list of interconnect experiences, a sales director remarks how he doesn't know of one that has ever been profitable. "And if operators are thinking about investing in an interconnect to make money, then they're in it for the wrong purpose." The *right* purpose, he says, is pushing regional sales revenues down to the local level. Another operator talks about a *new* New York interconnect that might function as a service organization, and draws an analogy to the area's existing marketing co-op.

The study will be back in July, with some optimistic souls expecting a resolution within three months. (Mark that on your calendar: October '90—hell freezes over.) There is general speculation among operators that Cablevision would be amenable to opening up CNI to investors. As one remarks, "[Chairman] Chuck Dolan is a businessman first." But for a businessman, pride may be easier to swallow than the $5 million in capital improvements Dolan has put into CNI since the purchase. Maybe that means CNI becomes New York's managing partner and it's a wash. However it plays, look for everyone to start having a whole new appreciation for CNI. ■

New British Invasion

BBC Lionheart has chosen U.S. cable networks to help conquer the American market by licensing archival programs and co-producing

By Richard Tedesco

Black Adder **landed A&E a surprise ACE Award for best comedy series, then sold 700,000 cassettes in the U.K.**

The British are coming.

It's not redcoats this time, but the British Broadcasting Corporation. And actually, this friendly assault on American cable networks is already well underway, with BBC Lionheart Television spearheading the effort.

Its immediate goal is to increase exposure for the world's largest English-language TV archive. Cable is an increasingly important part of that picture, as more than 60 percent of Lionheart's license fees here are with cable networks—a large jump from the 15 percent those deals represented earlier in Lionheart's six-year history.

Arts & Entertainment Network, The Discovery Channel, MTV, Turner Broadcasting, Lifetime, Bravo and Home Box Office have all done business with BBC, and virtually all U.S. cable networks are having discussions with the BBC in terms of either acquisitions or co-productions. As Lionheart, its American distribution co-production arm, has become more aggressive in pitching program possibilities, cable networks have realized the vast range of what's available, from documentaries to comedy.

"The BBC doesn't just do British mystery pieces or British genre pieces," says Pat Fili, senior vp of programming for Lifetime.

Licensed programming sold in the U.S. market and co-productions with cable and public television partners currently represents $30 million-$40 million per year. Jack Masters, president and ceo of BBC Lionheart, sees that revenue soaring to the $100 million range in the next five years.

That projection includes sales to the Big Three broadcast networks (a market the BBC wants to crack), as well as growth in the home video market, an area of top priority for BBC Lionheart in its strategy for this British invasion. "Sell-through video is going to be the answer for us," says Masters. "We'll be off and running in building the BBC name."

Lionheart also plans to add another revenue source by launching or acquiring an educational video venture in the next two years, similar to endeavors established by cable programmers in that venue.

Masters expects home video sales to equal program sales to cable in two years, as it seeks marketing outlets through video-of-the-month clubs and catalogue sales. (CBS Fox Video currently distributes some BBC home videos here.)

Despite the growing presence of BBC shows on U.S. TV screens, Lionheart feels its parent company still suffers from an absence of any clear image in the minds of American viewers. "There's a huge amount of the American public that doesn't know *anything* about the BBC," Masters says.

The expansion of its U.S. cable connection gives the BBC the opportunity it needs to change the misperception other Americans have of its programming, according to Sylvia Delia, vp of ancillaries for BBC Lionheart. "Everybody thinks of us as period costume drama, *Masterpiece Theatre*, and we're a hell of a lot more," says Delia.

The steady expansion of the BBC's

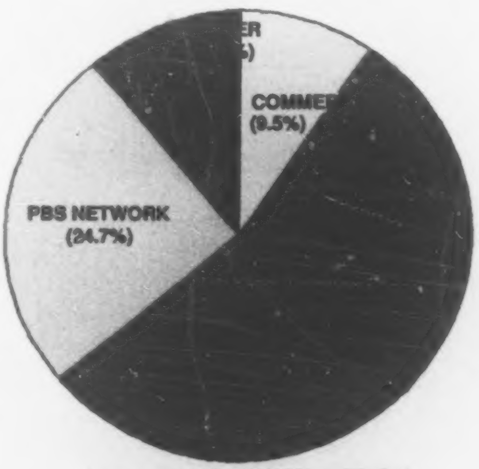
business with American cable networks has mirrored the maturation of those networks. "Our business has grown with the growth of cable," says Sarah Frank, senior vp in co-productions for BBC Lionheart TV. "BBC is like a big department store made up of little boutiques."

A&E First To Cultivate

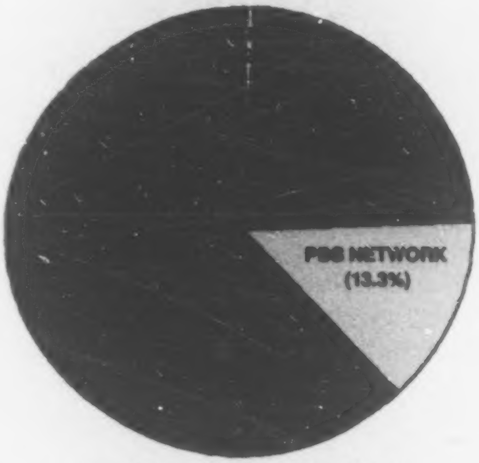
A&E was the BBC's first U.S. cable partner, in a relationship that has lasted as long as A&E has existed. A&E still claims right of first refusal on BBC dramas, some documentary features and other categories and remains the BBC's biggest cable client. It airs between as much as 120 hours of BBC product each year, representing about 15 percent of the schedule.

Nickolas Davatzes, A&E president and ceo, recognizes the transition the BBC has made in its mission to distribute programming in the U.S. "Ten years ago, their primary client was PBS. Now they're interested in talking with all of the cable networks, the broadcast networks and the pay networks," he says.

Much of the product A&E originally acquired from BBC was second-run after premieres on PBS. It is more frequently landing first-run fare these days, such as the offbeat comedy *Black Adder*—a big home video hit to the tune of 700,000 units sold in the United Kingdom.



BBC/LIONHEART TELEVISION
WRITTEN SALES MIX (YEAR 1987)



BBC/LIONHEART TELEVISION
WRITTEN SALES MIX (YTD 1989/90)

The biggest difference in A&E's relationship with the BBC is in the area of co-productions, which now represent 65 percent of the dollars A&E invests in BBC product for series such as *All Creatures Great and Small*. The desire to put its own stamp on productions, along with having a voice in the development of programming to serve its audience, is defining the dynamics of A&E's interaction with the BBC.

"We're interested in having a say in what is being developed and how it's being developed," Davatzes says.

From the BBC's point of view, U.S. cable networks have matured considerably in the last several years, both in their ability to pay the freight for first-rate, first-run shows. But there is a sense at Lionheart that U.S. cable programmers also are simply savvier about their business.

For its part, the BBC is more sensitive to developing product that is adaptable to the U.S. TV market. "The BBC constantly evolves in the type of programming that they've produced from year to year," Lionheart's Delia explains. "We've found new outlets for different types of programming from within the BBC stable so that we're expanding the nature of our programming here."

Lionheart has improved communications with BBC producers in London in order to convey the sort of parameters it considers in pitching productions to programmers here. So, for example, the BBC has been tending to produce fewer costume dramas. They also observe other differences in the nuances of the American market, according to Delia: fewer six-part series, a typical BBC practice, are

continued on page 110

BBC's program development for Turner Broadcasting includes *Trials of Life*, hosted by David Attenborough and scheduled for 1991

NEW BRITISH INVASION

continued from page 106

produced and documentaries are done without subtitles (the English don't mind reading their television screens; Americans do).

Since Lionheart also co-finances some productions, it can exercise some influence over the parameters of a particular production. "The considerations of what will work in the U.S. are known to the BBC producers in London," Jack Masters observes.

Providing Creative Input

Communication between U.S. cable programmers and their BBC counterparts also has been enhanced as their respective business relationships have evolved. That is particularly true in the area of co-productions, where cable is far from a silent partner. "It's now no longer just a financial relationship. It's a creative partnership right from the start," says Eileen Opatut, vp of co-productions for BBC Lionheart TV.

"They're very receptive. They're really opening up," says Chuck Gingold, senior vp of Discovery's U.S. programming, a trend he sees occurring with all international programmers.

The other notable change Gingold notes in the BBC's approach is an effort to redouble its efforts to market product from its extensive library and to develop co-productions with U.S. partners. "They've become more aggressive where they weren't before," Gingold observes. "And they realize they have a lot of quality programming that, properly positioned, can be valuable for cable networks in the U.S."

The first instance of Bravo's involvement with the BBC was early last year when Jonathan Sehring, Bravo vp of programming, called to make a deal for *The Lenny Henry Show*, the sort of comedy series most American viewers wouldn't naturally associate with the BBC. It was also the kind of show BBC Lionheart hadn't thought about pitching at the time. "The way BBC was structured, they never tried to sell to cable before," Sehring says.

Another BBC comedy series, *A Bit of Frye and Laurie* debuts on Bravo in September. Bravo has also done a deal for a minimum of 30 hours of BBC programming—to be culled primarily from the *Masterpiece Theatre* and *Mystery* series over the next two years.

Bravo's BBC lineup could include titles such as *Les Miserables*, Tolstoy classics *Anna Karenina* and *War and Peace*, not previously seen in the U.S., and a treatment of Dostoevsky's *Crime and Punishment*. "All of these titles we're considering are known entities to American audiences that have gotten little or no exposure. These things are almost like lost masterpieces in this country," Sehring says.

"Americanizing the BBC"

Discovery's efforts to "Americanize" programming it takes from the BBC is evident in its plans for *The Best of the BBC*, which debuts later this fall, as part of a three-year deal. Margot Kidder will be the on-air host for the series, consisting of 30 hours of shows the first year, including *America* with Alistair Cooke.

Next up on TDC is a co-production with BBC of 10 half-hours originally aired in the U.K. as *Nature*, to be called *Global Warming* when it begins airing on Discovery this summer, to be followed by a second sequence of shows later this year. TDC will add an American host and some additional reporting to the environmental series, according to Greg Moyer, senior vp of TDC's programming group.

A three-part BBC series titled *A Teacher's Story* also airs later this year as part of TDC's educational service. And Discovery has a verbal agreement with the BBC on another major project, according to Moyer.

Moyer proudly points to the BBC

> **'They've become more aggressive where they weren't before. And they realize they have a lot of quality programming that, properly positioned, can be valuable for cable networks in the U.S.'**
>
> *Chuck Gingold*

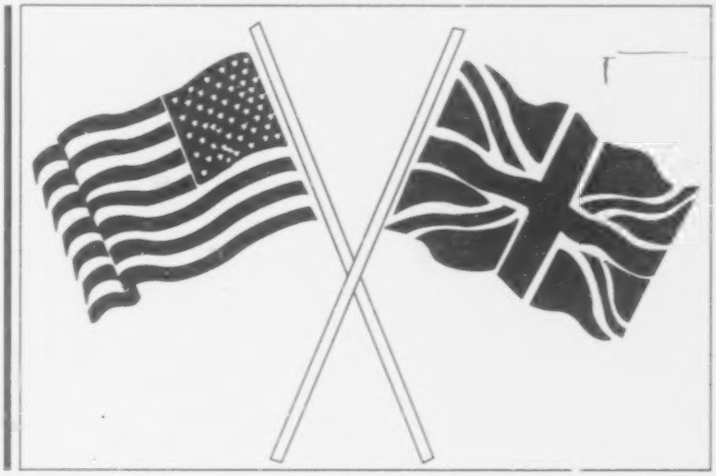
picking up TDC's *Ivory Wars* for its own air as one more sign of Discovery's maturity. Its ability to deal with the BBC in developing is an indication of the economic evolution of basic cable networks in the last several years. "There's a reality about the dollars we were able to spend in our first years on the air," Moyer says. "We just weren't a player in co-productions."

A&E, which remains BBC's biggest co-production partner, sees the BBC trying to take advantage of the worldwide environment in TV programming. "There's no question that there is an explosion in global coproduction and BBC wants to take part in that," says Brooke Johnson, A&E vp of programming.

Playing the program development game these days is typically a high stakes business and it's imperative for the BBC and it coproduction partners to maximize their dollars in order to get some things beyond a conceptual stage. "For certain projects, you need partners if you want to get them done," Sarah Frank observes.

She cites the example of *Trials of Life*, a 13-part series on animal behavior being co-produced with Turner Broadcasting for a 1991 debut. The three-year project, being filmed on location all over the world, will bear a price tag of $9 million to $10 million when it's completed, according to Frank. *Green Man*, a dramatization of the Kingsley Amis novel featuring Albert Finney, is another project Frank says could never have been executed without a co-production deal.

In some cases, PBS affiliate stations and cable networks have even become programming partners. Earlier this year, Lifetime aired *Hillary in Hiding*, the story of Hillary Morgan, the young girl whose mother had sought to conceal her whereabouts because of alleged sexual abuse at the hands of her father. After Lifetime repeated the show, a co-production with the BBC, in April, it sold rights to PBS and the special ran as a segment of WGBH's *Frontline* series.



Co-Productions to Double

Whatever variations may occur in the co-production area, Frank foresees the level of activity in coproductions with U.S. partners doubling over the next five years. The balance of BBC co-production activity now is approximately equal between the cable networks and PBS.

The BBC certainly is looking to cultivate as much of the American TV market as it can, including a connection it has only occasionally made in the past: the three major broadcast networks. BBC's programming has never been considered synonymous with commercial TV and apart from a few co-productions with ABC, the big three U.S. broadcast networks have never appeared to be a fruitful field for the BBC to cultivate.

But Jack Masters is determined to change that and he thinks they may be looking to acquire fresh programming to replace the usual spate of summer reruns because of competitive pressure from the cable networks.

"With the broadcast networks, I hope we'll reach a point where we will sell them made-for-TV movies, sitcoms and the occasional miniseries," says Masters, who sees the potential for that during the upcoming TV season.

In the meantime, BBC will continue to work at serving its current American clients in both cable and public broadcasting. "Even though it's a quicker route to cable, it's not always the route we'll take because it's a very important to keep first-run quality programming for all our clients. So we must keep good programming for our PBS syndication pipeline as well," says Lionheart's Delia.

Lionheart looks at every possible variation in marketing product, with an eye toward staggered windows for PBS and cable, for example, to maximize the reach of its product.

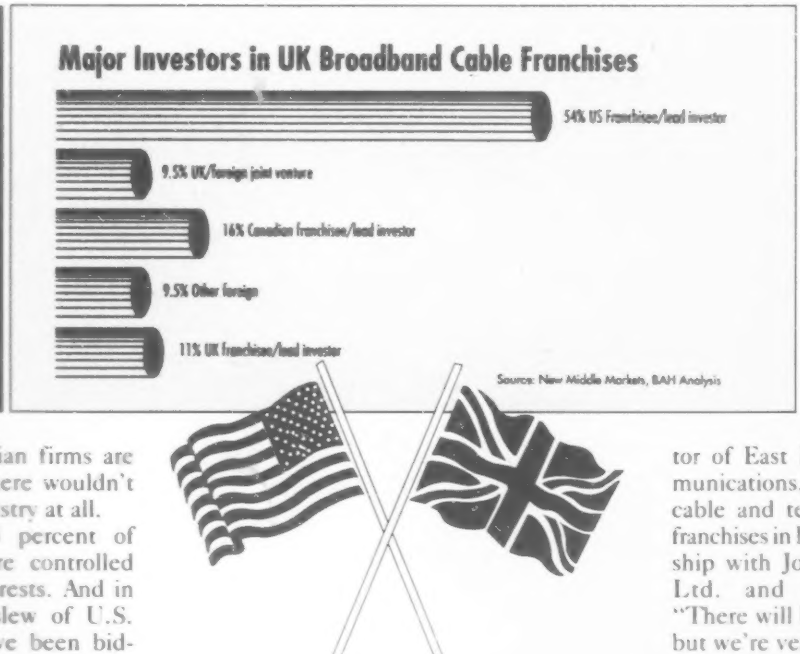
In licensed programming and co-productions, it is the consistency of BBC product that really gives it the reach to play well on both sides of the Atlantic. "Both marketplaces are looking for good stories of quality," Sarah Frank observes.

As the U.S. cable networks work at raising standards of programming, the BBC has become a vital source they will look to with increasing frequency in the future. ■

The Yanks Are Coming!

The U.K.'s hands-off approach to cable ownership has American operators lining up for franchises

By Larry Jaffee



Source: New Middle Markets, BAH Analysis

American history usually teaches that if it weren't for the U.S., Great Britain would have lost World War II. When it comes to cable tv in the U.K., even the Brits admit that without North American investment (Canadian firms are big players too), there wouldn't be much of an industry at all.

A whopping 95 percent of U.K. franchises are controlled by non-British interests. And in the past year, a slew of U.S. cable operators have been bidding for—and winning—this latest round of franchises because the British government has recognized that American capital, not to mention its cable management expertise, is the best way to wire its 21 million tv homes.

But will American operators be able to duplicate their success in a country where the public has had only four tv channels and already pays annual taxes of $112 for each color set and $80 for each black and white set in order to support the BBC?

The U.S. players—including well-known names like Comcast, United, Jones, ATC, Telecable, U.S. Cable, Masada, Insight, Falcon and Leonard—maintain the risk is worth taking for several reasons. With their plants at home virtually built out and system acquisition prices apparently headed down from their peak of $3,000 per sub, American operators are looking for new opportunities to grow.

Back To the Good Ol' Days

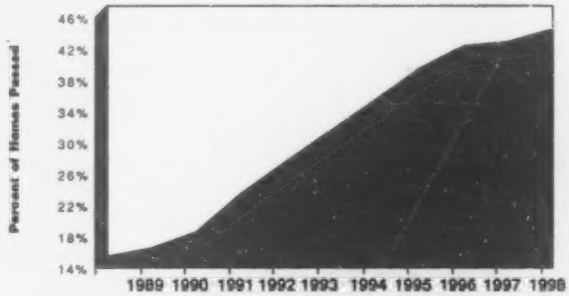
"There are opportunities to get franchises for large cable systems of 100,000 to 200,000 subscribers. That's something that hasn't happened since the early 1980s," notes Mark Sena, senior vp of Communications Equity Associates, which has provided brokerage services in the market to U.S. and British entities since 1983, when the U.K. first became interested in promoting broadband cable systems.

"It's the most exciting place to be in the cable business," says Gerald Yutkin, managing director of East London Telecommunications, Ltd., which owns cable and telecommunications franchises in London in a partnership with Jones Cable Group, Ltd. and Pacific Telesis. "There will be ups and downs, but we're very optimistic about U.K. opportunities in the future," adds Yutkin, who reports to Jones in the U.S.

"It's fun to be involved," echoes Bruce Godfrey, vp of investment banking for Daniels & Associates, which has been engineering U.K. deals. "It's like jumping back to the U.S. in the mid-1970s in atmosphere and tone."

Robert Clasen, president of Comcast International, which has invested in systems being constructed in London, Birmingham and Cambridge, admits to "political and cultural differences" in doing business in the U.K. But an overriding commonality is that the prospective subscribers speak English, making

U.K. CABLE PENETRATION PROJECTIONS
1989-1998



Source: EMCI, Inc., Malarkey-Taylor International.

it easier for Comcast to draw on its American experience. "Once we've made the sale, people watch the programming," Clasen says.

The British market hasn't always sparked such excitement. Says Richard Woollam, director of the Cable Television Association, Britain's version of the NCTA, "For the first time in a year, I feel optimistic." He gleefully accepts U.S. participation in his industry, and concedes that there would not be an expanded cable industry in Britain had it not been for the recent American and Canadian investment. (Major Canadian players include Rogers, Videotron, Maclean Hunter, CUC Broadcasting, and Cablecasting.)

Woollam isn't expecting any overnight miracles now that there is capital available. "The U.S. has had 20 years to convince the people that they need multichannel tv," he notes.

Investment Restrictions Eased

Surprisingly, cable technology has existed in Britain since the time it was introduced in the U.S. British research for radio and tv signal distribution by wire first began in 1936, but the war halted progress and the first cable system wasn't installed until 1951. By 1966 more than 1 million households received their tv signals by cable, and by 1972 some 2.3 million did.

But an important distinction between the American and British cable industries is that until 1983, when the government relaxed investment restrictions and encouraged broadband cable, U.K. systems often delivered only one channel and at most four. (Ex-Beatle Ringo Starr invested in one of the first broadband systems, in his hometown of Liverpool.)

A few years ago, the government also for the first time allowed companies to depreciate capital expenses. "Previously we weren't able to take big write-offs," says Clasen, adding

April 1990

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that Comcast was involved in one of the first broadband licenses in 1983 as a 20-percent partner in 10,000-home Ealing. The experience whetted Comcast's appetite, Clasen says, but the industry didn't take off until a year or two ago when market conditions, spurred in part by government reforms encouraging investment, began to change for the better.

By the end of this year, broadband franchises covering two-thirds of the country will already have been granted by the Cable Authority, which awards franchises based ideally on merit in a highly secretive, brief process that involves an elaborate written application/proposal, followed by a 90- to 120-minute in-person interview. The winner is announced several months later without explanation.

Despite political and cultural differences, "Once we've made the sale, people watch the programming," says Comcast's Robert Clasen.

Clasen finds the franchising process refreshing, but some in the business criticize it. The CTA's Woollam equated the process with flipping a coin. "You have to believe in its integrity because there's a disinterested third party deciding," Clasen says. He adds that, "eighty-five percent of the time the decision makes sense."

However, the CTA is being replaced by a new body, the Independent Television Commission, in January.

Laissez-Faire To Continue

In an effort to get all of the U.K. wired quickly, the ITC reportedly plans to award remaining franchises to companies willing to pay the highest amount to the government plus yearly franchise fees based on a percentage of revenue.

Woollam couldn't speculate about how high the price of the cash-bid franchises could go. But he's hopeful the amount will be reasonable. Meanwhile, the CTA is engaged in "delicate negotiations" with the government to insure the new process will be cable-friendly.

But Woollam predicts that only eight or nine franchise areas representing 300,000 households (of the 8 million left) will be hotly pursued in the competitive tender process because the premium areas have already been or shortly will be awarded. (Operators maintain it isn't worth wiring towns with fewer than 20,000 people with coaxial cable and Woollam forecasts these scattered markets most likely will be served by MMDS technology).

The ITC will take back franchises from current holders that haven't started building by year's end. So a tiny window of opportunity still exists in the next two months for American operators to hook up with nationals needing capital to get started. Otherwise, they'll have to chance their luck in the impending bidding wars.

"The Authority knows that there will be some trading going on," says G. Nicholas Mellersh, director of Malarkey-Taylor International, a cable consultant in Britain. "They're concerned with getting those systems built."

Had it not been for North American investors, the British cable industry wouldn't be much different than it was three years ago, Mellersh believes.

Although some other regulatory changes are expected in the broadcasting bill to be acted upon at year's end, franchising will remain in the hands of the federal government and not local authorities. Also not expected to change is Britain's policy that allows foreign investors to establish off-shore concerns and still own the company. It's important to note that the American and Canadian goldrush only began a few years ago when the government relaxed an investment restriction that capped foreign ownership in companies doing business in Britain at 20 percent.

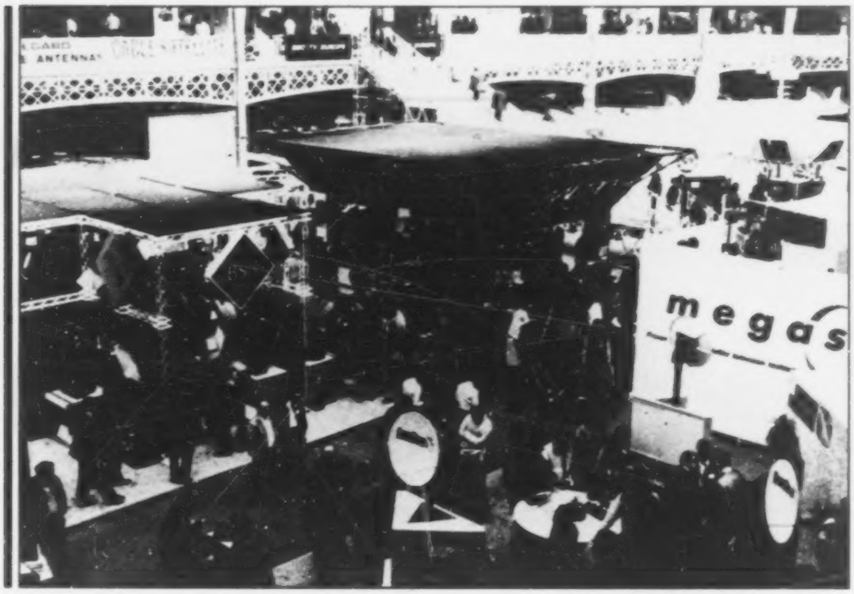
Although Prime Minister Margaret Thatcher's popularity is at an all-time low partly due to her disapproval of the 1992 European Community economic plan, it's unlikely that the Labor Party, should it come into power, dismantle the government's *laissez-faire* approach to cable.

Mellersh believes that if Labor wins, "things would certainly change but I don't think it would be disastrous. They've become much more pragmatic and realize that they can't win with a full-blown socialist platform." No matter which party wins, the country is facing much greater priorities, he notes, adding that "I certainly don't think cable is high on either party's list."

Perfect Timing

Operators rolling the dice in Britain may also benefit from fortuitous timing. Consumers there have been been primed for multichannel possibilities by the year-old Sky Television, a direct broadcast satellite service launched by Rupert Murdoch, and its just-launched competitor, British Satellite Broadcasting.

British operators are telling consumers that cable provides a better value for the pound and significantly more channels, including those offered by Sky and BSB, than the



American vendors doing business on the floor at the Cable Satellite '90 conference in London last month included: Jerrold, Scientific-Atlanta, CNN, MTV, Anixter and Texscan.

DTH (direct-to-home) services. The operators also point out that cable presents a one-time inconvenience to neighborhoods and that individual households don't need an unsightly dish, or two if they want both Sky and BSB.

North American investors have also been encouraged by Britain's 65-70 percent videocassette recorder penetration rate, demonstrating that the British public will pay for home entertainment, such as movies.

The growth opportunities are significant considering that at the beginning of 1990, only 600,000 households were passed by 14 broadband cable franchises serving only 86,000 subscribers. Since last year, Cable Authority has awarded 140 new franchises—many of which are now being built—passing 14 million homes.

Telco-Cable Experiment

With U.K. cable systems being designed and constructed from scratch, American players can take advantage of other revenue opportunities, such as telephony, which they might want to introduce in the U.S. if the British experience goes well.

In Britain, cable-telco crossownership isn't the thorny issue that it is here. In fact, Comcast and Jones have struck partnerships with Bell Operating Companies U.S. West and Pacific Telesis, respectively, to help construct, own and operate systems.

Along with providing video service, many of the franchise holders, such as Jones, are constructing systems that could also offer telephony for both business and residential markets. The country's mammoth telephone company, British Telecom, operates cable systems serving 55,000 of the country's total broadband system subscribers. But BT in February announced that it was divesting its cable holdings to concentrate on its core business.

Although telcos don't represent the enemy in the U.K. the way they do in the U.S., BT itself is mistrusted by U.K. cable operators for its alleged monopolistic practices. The government will review this fall its "duopoly" arrangement, which in 1981 opened up phone service competition to BT by allowing the creation of another company, Mercury Communications.

Mercury has been working with cable companies on developing their networks to offer business and residential telephony. If the duopoly is reinforced, more cable operators may consider providing phone service.

Meanwhile, cash-rich U.S. phone companies like PacTel, U.S. West, Southwestern Bell, NYNEX, as well as Bell Canada, are getting their feet wet in U.K. cable, an experience that could prove valuable should they be allowed into the business back home.

Getting Systems Built

Another magnet to American investors is the fact that much of the housing to be wired in the U.K. is high-density multiple dwelling units. On the other hand, government regulations call for virtually all of the wiring to be underground, a much more expensive proposition than aerial construction.

Also uncertain for American operators is the question of labor: they no doubt will have to import skilled technicians for many jobs. But new systems will create thousands of new positions for Britons in departments like marketing and customer service. As Peter Stremes, a native working as a marketing manager in the United corporate office, points out that although there is little resentment about Yanks managing cable in the U.K., it would be foolish for United to send arrogant Americans and their accents to sell cable door-to-door.

"We need their (Americans') expertise to get the thing going," Stremes says. "No one has done it before."

Stremes adds that there are some differences in approach to marketing cable in the U.K. For example, a cable company couldn't use doorhangers for marketing. "The police would say we're endangering people's lives by telling burglars that people aren't home. It would be a P.R. disaster."

The biggest challenge is to educate consumers about cable. "Thirty channels is beyond the comprehension of the average person," Stremes says. As a result, marketing materials and direct mail tend to be informative in nature, while door-to-door sales forces push individual channels.

Generally, the pricing structure is similar to the basic-plus-premium model that is all but universal in the U.S. At United's newbuild South London system, standard (basic service) costs £11.95 ($19.12) and includes CNN, MTV and sports channels, while premium movie and ethnic channels cost£ 5.95 or£ 7.95 a la carte. A dual combination of Sky Movies and Sky News costs£ 12.95 ($20.72).

DBS—Friend and Competitor

Although they compete directly with cable, the U.K.'s budding direct-to-home channels, Sky and BSB, have also proven to be excellent selling tools for cable, according to Stremes.

Comcast's Clasen agrees: "Sky and BSB have helped tremendously. I don't see them as competition." From a consumer point of view, cable clearly has advantages over direct-to-home, Clasen says, "but we're working cooperatively to help build the DTH business. That's nine great channels." (Comcast has also capitalized on the VCR's popularity by promoting cable programming on a 10-minute videotape).

Sky and BSB started their businesses with the intention of delivering their programming directly to consumers, but acceptance has been slow. A Sky spokesperson admits the company is losing about£ 2 million (about $3.2 million) a week. Consumers haven't jumped at the chance to buy dish-and-receiver systems for $500-$1,000, and also pay $16 per month for movie channels. Sky subsequently altered its business plan to rent the systems for a weekly fee of about $8.

Meanwhile cable systems, hungry for programming, distribute Sky's nine channels and BSB's five in affiliate arrangements similar to U.S. programmer/operator relationships. Systems pay Sky 15 pence (24 cents) per sub for each basic channel, and split revenues from the sale of premium movie services. Half of Sky's 1.1 million subscribers are distributed via cable systems.

It's all a matter of choice

BBC1, BBC2, ITV and Channel 4 put out some excellent programmes. And yet most of us still find ourselves saying – all too often, it seems – 'There's nothing on TV tonight'.

It's all a matter of choice – or lack of it!

And that's particularly true if you don't watch a lot of television. Because, when you *do* want to watch, you want to be sure there's something worth watching.

Cable television from United Artists Communications solves the problem. It brings to your home a really great choice of viewing options. Not only do you get the four usual channels, you also get *all* the satellite channels without the need to pay for and install unsightly dishes.

And then the choice goes on! Channels that provide twenty-four hour national and international news. The Discovery Channel that presents high quality, documentary programmes about life, the universe and everything. Channels that give you the opportunity to be present at

In promotional materials, United is targeting young families to be ideal cable subscribers.

"Cable has done well, but they would have a terrible problem without us," says Fiona Waters, a Sky spokeperson.

For the time being, the Sky and BSB programming is very valuable, but British operators anticipate the startups of cable-exclusive channels. In fact, a consortium of American MSOs-in-Britain is already developing them. "It's the vertical integration concept that works so great in the U.S.," says Clasen.

European versions of CNN, MTV, Bravo and Discovery are already offered by some British operators, and are paving the way for other American cable programmers.

U.K. Banks Not Enthusiastic

North American banks experienced at financing cable ventures in the U.S., such as Bank of Boston and Toronto Dominion, are warming up to backing British deals as well, especially since the prospect of reregulation and a tightening of credit markets has slowed deal making in the U.S.

The banks' "initial interest" has lately turned into "keen interest," reports Jones' Yutkin. That's good news to Jones, which could spend as much as $1 billion constructing two systems passing 384,000 homes plus six franchises passing 630,000 homes the company is building with PacTel.

British banks don't share the North Americans' enthusiasm for cable, primarily because they are accustomed to investing on an asset basis. Because cable lending is typcially done on a cashflow basis, there is virtually no U.K. equity in the industry. "They really don't understand it," says CEA's Sena, who predicts that within the next 12-18 months, when penetrations have begun to rise, the City of London's financial community, "will realize what the business is all about."

Malarkey-Taylor's Mellersh points out that the British investment community "has missed the boat (on

'Daniels has had little problem finding investors for U.K. cable systems'

— Bruce Godfrey

cable). They've had five years."

Some American financial players like Goldman Sachs and Prudential Bache have been awarded franchises in which they have taken lead equity positions themselves.

Since 1983, CEA has arranged financing for numerous cable deals in Scotland, Wales, England, Northern Ireland and Ireland. It has also helped Americans go to the U.K. to learn about the market and has paired them with local franchise holders in need of capital. In addition to providing brokerage services, CEA also provides investment banking for raising equity and debt.

Paine Webber has been CEA's biggest competitor for those kinds of services, but Daniels & Associates recently has become very active in the market, Sena notes.

Different Entry Strategies

As in the U.S., the new U.K. cable operations come in all flavors. Some of those under construction incorporate provisions for telephone service and are state-of-the-art switched fiber builds, while others are of the plain vanilla coaxial sort designed only to provide video.

The latter is the case with two rural franchises awarded to Leonard Communications on the southern coast of England, in Dorset and Thanet, passing 95,000 homes.

The systems, for which Daniels is raising $16 million in equity, will offer 25-30 channels and turn on their first subscribers in the fall. By the end of the first year, 20 percent of the franchise areas should be built, and by the fifth year, Daniels projects a subscriber penetration of 40 percent of homes passed.

Once subscribers are on board and cashflow is established, "we'll borrow more money to finish construction," says Daniels' Godfrey. A handful of cable-savvy institutional and individual limited partners who have invested in cable operations in the U.S. are backing the Leonard venture. For most of them, this marks the first time they've risked capital in the U.K. or Europe. Three U.K. banking institutions are also investing, but Godfrey declined to identify them.

Daniels has had little problem finding investors. "Plus or minus 5 percentage points on the rate of return— or even 10 points—has no influence on the decision to invest," Godfrey says. "Conceptually, they believe it will or it won't. I don't see people changing their mind very often."

Godfrey declines to reveal how much principal Roger Leonard is putting up himself, but admits the entrepreneur is providing "a significant piece of equity going in and carried interest on the backend."

Because most other American investors have gone after franchises in Britain's largest cities, "Leonard has had its pick of the smaller markets," explains Godfrey. "Roger (Leonard) wanted to bite off a deal of size and scope that could be managed effectively."

Insight Communications will soon close on its acquisition of the Glasgow, Scotland system, which is 50 percent built, from a partnership led by British publishing mogul Robert Maxwell. CEA represents the seller, in a transaction Sena calls "the most difficult ever" because of the differing interests of the three main partners and shareholders who have to be bought out.

Insight, which last fall put its 10 U.S. systems up for sale to help finance the U.K. move, decided to jump right into an already operating British system and not get bogged down by the franchising process.

In contrast, Comcast has sought to become partners with local entities that need financial help and management expertise but already have obtained franchises. For example, last month the company received permission to invest in as well as help build and develop the cable/telephone system in Birmingham, England's second largest city. The franchise encompasses approximately 460,000 homes and 40,000 businesses.

Comcast will invest $30-$40 million in equity over the next two years in three projects (Birmingham, London and Cambridge) representing 1 million homes, according to Clasen.

"We need Americans' expertise to get the thing going. No one has done it before," says United's Peter Stremos.

Opportunities for Locals

British entrepreneurs like Danny Thomas, who owns a construction company and a cable franchise he is building with American cable pioneer George Linderman, agrees that without the Yanks, there wouldn't be a British cable industry. "That's an absolute fact," maintains Thomas, who points out that during April's Cable Satellite Europe conference, he shook hands with not one British client. "They're all American," he says, citing as an example the fiber splicing he's doing for Anixter, one of a number of

U.S.-based hardware suppliers doing business in the U.K.

Other American vendors exhibiting at the conference included Jerrold, Scientific-Atlanta, C-Cor, Texscan Instruments, Toner Cable and Times Fiber Communications.

Dean DeBiase, president of Anixter International, which has served the U.K. market since the 1960s, says British franchise holders have been very receptive to introducing fiber optics in newbuilds. Anixter has also been promoting its ability to design fiber systems, he says, "as opposed to just pushing products."

Every product Anixter and other suppliers handle must be customized for the British market and tested differently because of a different signal standard (PAL instead of NTSC), as well as a different power supply and labelling stickers.

30% Penetration Predicted

Manchester, the U.K.'s third largest city with 900,000 homes, is presently the object of desire by a handful of vying American players. In addition to a few local bidders, Time Warner (ATC); Masada/PacTel; Telecable; and US Cable/NYNEX have been interviewed by the CA, which must announce the winners in all outstanding franchises by the end of July.

Five different franchise areas within Manchester and Greater Manchester have been advertised, but it's unclear whether each bidder will end up with a piece or most of the area will go to one or two of the parties. Woollam notes that London originally was awarded to several different companies, but, as with many U.S. cities, some of the winners ultimately were bought out by stronger operators.

The competition underway in Manchester represents a far cry from two years ago when advertised franchises could attract as few as a single applicant.

Britain is the most exciting place to be in the cable business today, according to Jones' Gerald Yutkin.

With the influx of new construction, Malarkey-Taylor projects that the current cable penetration of approximately 15 percent of homes passed will rise to approximately 30 percent by 1993 and 43 percent by 1998.

Samuel Book, director of MT's research division, says those projections make no assumptions about how effective operators' marketing will be. But several factors—programming improvements and the market's very high density except in rural areas—suggest that once U.K. cable hits 30 percent penetration of homes passed it will be a profitable business.

"The government welcomes overseas investment, and is keen to see broadband cable prosper," sums up Eric Forth, the Parliamentary Under Secretary for Industry and Commerce. The official sees the government's role as creating more choice and providing a flexible framework to allow the business to prosper. "The acid test," he adds, however, "will come when the cable operators try to convert their promises into action." ■

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QUARTERLY EARNINGS CHART

Dollar amount in thousands

Company (Quarter/Fiscal Year)	**Revenues**	**%Change**	**Operating Profit**	**%Change**	**Net Income**	**%Change**
ATC (1st/90)	$ 266,447	12.6	$ 70,570	16.9	$ 26,802	23.5
C-Cor Electronics (3rd/90)	18,310	21.6	N.A.	N.A.	1,666	30.6
General Instrument (4th/90)	351,202	6.3	36,020	15.7	21,462	3.8
Jones Intercable Investors (4th/89)	8,225	13.3	3,014	5.2	- 3,157	- 10.7
RMS International (4th/89)	2,781	- 1.81	N.A.	N.A.	- 667	21.4
TCA Cable (1st/90)	26,965	32.1	6,731	18.7	851	- 70.4

whose sale price was kept confidential. State engaged **Daniels & Associates** to help complete matters.

- After one sale attempt went sour, **QVC Network** has finally made good on a pledge to divest its **C.O.M.B.** mail-order business unit. **Fingerhut**, the popular catalog merchant, will pay QVC $3.5 million in cash for C.O.M.B.'s assets, including inventories, tradename rights and customer records. The division's retail store chain, covering a number of Midwest locations, was not included in the deal. QVC had planned to turn those assets over to **Damark International**, but the agreement was terminated last month because several conditions were not met. C.O.M.B. fell in QVC's hands when the home shopping channel acquired rival **CVN** last October. CVN was created as a C.O.M.B. division four years ago, in association with **TCI**.

- **InterMedia Partners** picked up 18,000 subscribers residing in Gainesville and Hall County, GA after buying two systems from **UA Entertainment**. Terms of the transaction were not disclosed. InterMedia will operate the systems under its Melanie Cable Partners limited partnership.

- **Continental Cablevision** picked up another system in its home state by acquiring **Colonial Cablevision** of Revere, MA, which has 13,250 subscribers. Two months earlier, Colonial sold its Milford, MA system to Continental, involving about 6,850 households. The combined transaction went for more than $3,000 per sub at a total price of $60-62 million. **Communications Equity Associates** handled the sale for Colonial.

- **Warner Cable** is selling its systems in Bulan, Manchester and Williamsburg, KY. Together, the systems serve some 9,500 subscribers. Warner picked **Daniels & Associates** as sale representative.

- **Friendship Cable** will put its Balch Springs, Royce City and Terrell, TX systems up for sale. About 8,000 homes are covered by the three properties. ■

April 1990

This announcement appears as a matter of record only.

$114,000,000

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DATABASE

Announced Services

Satellite-fed services	Expected launch
American Western Network	2nd Quarter 1990
American Trial Network	4th Quarter 1990
The Asia Network	2nd Quarter 1990
Career Channel Network	11/90
Career TV Network	10/90
The Chiller Channel	4th Quarter 1990
Cowboy TV Network	11/90
Digital Cable Radio	2nd Quarter 1990
Digital Radio Channel	6/90
DMX/Digital Music Express (formerly CD/18: The Digital Music Network)	4th Quarter 1990
The Food Channel	1991-92
The Gaming Network	9/90
The Global Channel	2nd Quarter 1990
Global Village Network	1991
The How-To Channel	1st Quarter 1991
In Court	9/90
International Channel	7/90
Maximum Entertainment Network	3/91
Music Image Channel	11/90
The Sci-Fi Channel	12/90
The Syndex Channel	1990
Talk Television	1990

Non satellite-fed services	Expected launch
ACTV	4th Quarter 1990
Main Street	1991

Pay-Per-View Services Profile

	LAUNCH	DELIVERY	ENCRYPTION	PROGRAMMING	SYSTEMS	ADDRESSABLE SUBSCRIBERS
Cable Video Store	April 1, 1986	Galaxy III, tr.5	VideoCipher II	Movies, how-to's, special events.	150	1,100,000
Drive-In Cinema (Graff PPV)	July 1, 1989	Spacenet II tr.1	VideoCipher II	Action/comedy/horror films.	10	500,000
Playboy At Night	September 1, 1987	Satcom IV, tr.24	VideoCipher II	Original Playboy programs and adult motion pictures.	100	3,000,000
Rendezvous (Graff PPV)	July 1, 1989	Spacenet II, tr.2	VideoCipher II	Adult entertainment movies & specials.	20	1,100,000
Request Television	November 27, 1985	R-1: Satcom III-R, tr.19 R-2: Satcom III-R, tr.24	VideoCipher II	Two channels offering movies and special events	368	6,100,000
Tuxxedo Network	December 1, 1987	Galaxy II, tr. 10	VideoCipher II	Adult movies and special events.	28	1,000,000
Viewer's Choice	November 26, 1985	VC-1: Galaxy III, tr. 21, VC-2: Galaxy III, tr. 16	VideoCipher II	Two channels of movies and special events	300	6,300,000

TV Household Profile

	ADULTS IN TV HOUSEHOLDS	%	MEN IN TV HOMES	%	WOMEN IN TV HOMES	%
TOTAL U.S. POPULATION	180,974,000	100	86,307,000	100	94,667,000	100
BASIC CABLE	97,144,000	53.7	47,034,000	54.5	50,110,000	52.9
PAY CABLE	52,866,000	29.2	26,711,000	30.9	26,155,000	27.6
MEDIAN AGE	**TOTAL**		**MEN**		**WOMEN**	
ALL HOMES	40.8		39.9		41.7	
BASIC CABLE	40.4		39.8		41.0	
PAY CABLE	37.7		37.5		37.9	
MEDIAN HOUSEHOLD INCOME	**TOTAL**		**MEN**		**WOMEN**	
ALL HOMES	$31,717		$33,829		$29,538	
BASIC CABLE	36,372		38,746		33,790	
PAY CABLE	40,111		41,534		38,579	

Source: Mediamark Research: estimates as of 1/90

Top 100 MSO's

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	6,902,535	(5/90)
2.	American Television & Communications Corp.	4,300,000	(12/89)
3.	UA Entertainment	2,592,000	(2/90)
4.	Continental Cablevision	2,525,000	(1/90)
5.	Warner Cable Communications	1,750,000	(3/90)
6.	Cox Cable Communications	1,555,213	(1/90)
7.	Comcast	1,535,000	(1/90)
8.	Storer Cable Communications	1,530,000	(1/90)
9.	Cablevision Systems	1,474,600	(3/90)
10.	Jones Intercable/Spacelink	1,428,846	(4/90)
11.	Newhouse Broadcasting	1,200,000	(11/89)
(13) 12.	Times Mirror Cable TV	1,082,000	(2/90)
(14) 13.	Cablevision Industries	1,044,396	(3/90)
(12) 14.	Heritage Communications	1,042,345	(3/90)
15.	Viacom Cable	1,016,000	(2/90)
16.	Sammons Communications	873,590	(1/90)
17.	Century Communications	825,000	(2/90)
18.	Adelphia Communications	817,000	(3/90)
19.	Paragon Communications	764,734	(1/90)
20.	Falcon Cable TV	700,000	(10/89)
21.	Cooke Cablevision	591,032	(12/89)
22.	Telecable	584,552	(1/90)
(24) 23.	Scripps-Howard	540,000	(1/90)
(23) 24.	KBLCOM	530,732	(3/90)
25.	Multivision Cable TV	499,491	(1/90)
26.	Tele-Media	475,163	(9/89)
27.	Prime Cable	468,822	(1/90)
28.	Lenfest Group	457,886	(3/90)
29.	Maclean Hunter Cable TV	437,500	(1/90)
30.	Post-Newsweek Cable	413,213	(1/90)
31.	Cencom Cable	410,000	(11/89)
32.	TCA Group	405,000	(1/90)
33.	Multimedia Cablevision	328,902	(1/90)
34.	Colony Communications	327,924	(1/90)
35.	Simmons Communications	315,000	(12/89)
36.	Rifkin & Associates	312,700	(1/90)
37.	TKR Cable	293,212	(2/90)
38.	Western Communications	287,800	(1/90)
39.	Triax Communications	279,612	(1/90)
(41) 40.	Hauser Communications	248,100	(4/90)
(40) 41.	Star Cablevision Group	240,096	(8/89)
42.	Service Electric Cable TV Inc.	220,000	(1/90)
43.	Greater Media	205,000	(9/89)
44.	King Videocable	193,413	(1/90)
(49) 45.	Insight Communications	192,500	(4/90)
(45) 46.	Columbia International	191,000	(3/90)
(46) 47.	Sutton Capital	189,179	(9/89)
(47) 48.	Harron Communications	187,000	(4/90)
(48) 49.	Media General	181,785	(1/90)
50.	C-Tec Cable Systems	180,311	(3/90)
51.	U.S. Cable Corp.	172,500	(1/90)
52.	Palmer Communications	166,059	(1/90)
53.	Armstrong Utilities	153,902	(1/90)
54.	Northland Communications	141,398	(11/89)
55.	Summit Communications	141,000	(10/89)
56.	Bresnan Communications	129,780	(1/90)
57.	Booth Communications	125,437	(1/90)
58.	McDonald Group	125,000	(1/90)
(67) 59.	Chambers Communications	118,100	(5/90)
(59) 60.	Susquehanna Broadcasting	117,109	(1/90)
(60) 61.	United Video Management	117,000	(1/90)
(61) 62.	Pencor Services	108,564	(1/90)
(62) 63.	Sonic Communications	97,837	(12/89)
(63) 64.	Midcontinent Cable Systems Co.	95,550	(6/89)
(64) 65.	WEHCO Video	95,666	(1/90)
(65) 66.	First Carolina Communications	94,253	(1/90)
(66) 67.	Gilbert Media	93,000	(1/90)
68.	Coaxial Communications	83,300	(5/89)
69.	Barden Cablevision	79,783	(1/90)
70.	InterMedia Parnters	78,000	(3/90)
71.	James Cable Partners	76,756	(1/90)
72.	Mission Cable	74,223	(1/90)
73.	Douglas Communications	72,400	(1/90)
74.	Leonard Communications	66,000	(2/90)
75.	Fanch Communications	65,000	(1/90)
76.	Cardinal Comunications	61,287	(1/90)
77.	Omega Communications	60,000	(8/89)
78.	Helicon Corp.	60,000	(1/90)
79.	Telesat Cablevision Inc.	57,235	(6/89)
80.	Galaxy Cablevision	56,489	(2/90)
(82) 81.	Prestige Cable TV Inc.	52,774	(1/90)
(83) 82.	New England Cablevision	52,409	(1/90)
(84) 83.	Masada Corp.	52,000	(2/90)
(85) 84.	Star Cable Associates	51,875	(2/90)
(86) 85.	Rock Associates	49,053	(1/90)
(87) 86.	Donrey Media Group	49,040	(12/89)
(88) 87.	Cable America Corp.	48,130	(3/90)
(89) 88.	Republic Communications Corp.	47,000	(1/90)
(97) 89.	Raystay Co.	45,241	(3/90)
90.	Amzak Cable	45,125	(3/90)
91.	360 Corp.	45,000	(5/89)
92.	CableSouth Inc.	43,420	(10/89)
93.	Cable Holdings Inc.	43,135	(10/89)
94.	Vista Communications	41,962	(1/90)
95.	Eastern Connecticut Cable TV	41,820	(6/89)
(new) 96.	National Cable Ltd.	41,300	(4/90)
97.	C4 Media	41,275	(7/89)
98.	Acton Corp.	40,400	(3/89)
99.	Schurz Communications	40,078	(8/89)
100.	Benchmark Communications	38,000	(1/90)

( ) **Rank last listing**

Subscriber counts are provided by MSOs and systems to Cable Vision. Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 345 Park Avenue So., 9th Floor, New York, NY 10010.

Top 100 Systems

Rank	Location	Operator	Basic subs	
1.	Long Island, NY	Cablevision Systems	523,502	(3/90)
2.	Orlando/Central Complex, FL	ATC	420,000	(1/90)
3.	San Diego, CA	Cox Cable	310,740	(3/90)
4.	Phoenix, AZ	Times Mirror	287,240	(2/90)
5.	Manhattan, NY	ATC	245,000	(5/90)
6.	Puget Sound, WA	Viacom	234,200	(1/90)
7.	San Antonio, TX	KBLCOM	223,769	(3/90)
8.	East Orange, NJ	Maclean Hunter	217,000	(3/90)
9.	Honolulu, HI	ATC	209,000	(1/90)
10.	Brooklyn/Queens, NY	ATC/Warner	200,000	(5/90)
11.	Houston, TX	Warner	183,000	(3/90)
12.	Chicago Suburbs, IL	Continental	181,537	(9/89)
13.	Wayne, NJ	UA Entertainment	180,746	(3/90)
14.	Atlanta, GA	Prime Cable	176,711	(4/90)
15.	Rochester, NY	ATC	174,000	(1/90)
16.	Cherry Hill, NJ	Garden State Cable	172,799	(4/90)
17.	Cincinnati, OH	Warner	171,860	(4/90)
18.	Hampton Roads, VA	Cox Cable	170,206	(3/90)
19.	Louisville/Jeff. Co., KY	Storer Communications	170,000	(8/89)
20.	Chicago, IL	TCI	169,608	(3/90)
21.	Cleveland, OH	Cablevision Systems	168,773	(2/90)
22.	Fairfax, VA	Media General	164,519	(6/89)
23.	Connecticut Complex	Cablevision Systems	163,084	(2/90)
24.	Hartford/Plainville/Vernon, CT	UA Entertainment	161,075	(3/90)
25.	Montgomery County, MD/ Arlington, VA	Hauser	159,500	(4/90)
26.	Kansas City, MO	ATC	159,000	(1/90)
27.	Jacksonville, FL	Continental Cablevision	154,600	(5/89)
28.	Baltimore County, MD	Comcast	151,000	(4/90)
29.	Manhattan, NY	Paragon	150,885	(4/90)
30.	San Jose/Campbell, CA	Heritage	149,197	(3/90)
31.	Denver (suburbs), CO	UA Entertainment	148,167	(3/90)
32.	Memphis/W. Memphis, TN	ATC	147,000	(1/90)
33.	Tulsa, OK	UA Entertainment	145,738	(3/90)
34.	Charlotte, NC	ATC	145,000	(1/90)
35.	San Francisco, CA	Viacom	141,600	(1/90)
36.	Pompano, FL	Continental	140,084	(9/89)
37.	Buffalo, NY	Adelphia Communications	139,515	(8/89)
38.	San Diego, CA	ATC	135,300	(11/89)
39.	St. Louis, MO	Cencom	135,230	(6/89)
40.	Las Vegas, NV	Prime Cable	132,878	(4/90)
41.	Seattle, WA	TCI	131,315	(3/90)
42.	Austin, TX	ATC	128,000	(1/90)
43.	Chicago Suburbs, IL	Jones	126,000	(2/90)
44.	Warren, NJ	TKR	124,000	(2/90)
45.	Tacoma, WA	Viacom	120,700	(1/90)
46.	Raleigh/Durham, NC	ATC	120,000	(1/90)
47.	Wilmington, DE	Heritage	116,666	(3/90)
48.	San Diego County, CA	Times Mirror	115,884	(2/90)
49.	Southeast Michigan	Comcast	115,000	(4/90)
50.	Pinellas County, FL	Newhouse	114,000	(6/89)
51.	Grand Rapids, MI	UA Entertainment	113,119	(3/90)
52.	Hillsborough/Tampa, FL	Paragon	112,103	(1/90)
53.	Indianapolis, IN	Comcast	112,000	(4/90)
54.	Orange County, LA	Times Mirror	111,506	(2/90)
55.	Toledo, OH	Blade Communications	110,785	(5/89)
56.	Dallas, TX	TCI	110,000	(3/90)
57.	Jefferson Parish/Kenner, LA	Cox Cable	107,639	(3/90)
58.	Boston/Brookline, MA	Cablevision Systems	106,346	(2/90)
59.	San Juan, PR	Multivision Cable	106,046	(6/89)
60.	Nashville, TN	Viacom	105,400	(1/90)
61.	Chicago, IL	Group W	104,000	(3/90)
62.	Richmond, VA	Continental	102,121	(10/89)
63.	Jackson, MS	ATC	101,000	(1/90)
64.	Pittsburgh, PA	TCI	99,187	(3/90)
65.	Columbus, OH	Warner	98,000	(3/90)
66.	Monmouth, NJ	Sutton Capital	97,579	(9/89)
67.	Greensboro, NC	ATC	97,000	(1/90)
68.	Reading, PA	ATC	96,000	(1/90)
69.	St. Petersburg, FL	Paragon	95,412	(2/89)
70.	Naples, FL	Palmer	94,450	(6/89)
71.	Worcester Complex, MA	Greater Media	94,897	(9/89)
72.	Portland, OR	KBLCOM	91,743	(3/90)
73.	Fresno, CA	Continental	91,253	(4/90)
74.	Albuquerque, NM	Jones Intercable	91,205	(12/89)
75.	Dade/Broward County, FL	Storer	90,000	(8/89)
76.	Wichita, KS	Multimedia	88,732	(9/89)
77.	Independence, MO	Jones	88,628	(8/89)
78.	Minneapolis/St. Paul suburbs, MN	Hauser	88,600	(4/90)
79.	Houston Suburbs, TX	Prime Cable	88,388	(4/90)
80.	Fayetteville, NC	ATC	87,000	(1/90)
81.	Milwaukee, WI	Warner	87,000	(3/90)
82.	South Bend, IN	Heritage	87,000	(3/90)
83.	Tucson, AZ	Cooke	86,976	(8/89)
84.	Akron, OH	Warner	86,000	(9/89)
85.	Toms River, NJ	Adelphia	85,826	(2/90)
86.	Baton Rouge, LA	UA Entertainment	85,476	(3/90)
87.	Harrisburg, PA	Sammons	85,200	(8/89)
88.	Orange County, CA	KBLCOM	85,102	(3/90)
89.	Dover/Morristown, NJ	Sammons	84,640	(8/89)
90.	Medford, MA	Warner	83,000	(3/90)
91.	W. San Fernando Valley, CA	CV Industries	82,967	(2/90)
92.	Buffalo, NY	TCI	82,629	(3/90)
93.	New Orleans, LA	Cox Cable	81,721	(3/90)
94.	Oklahoma City, OK	Cox Cable	81,404	(3/90)
95.	Lincoln, RI	Heritage	80,949	(3/90)
96.	Providence/Warwick, RI	Times Mirror	80,523	(2/90)
97.	Harlingen, TX	Heritage	79,794	(3/90)
98.	Columbia, SC	CV Industries	78,818	(2/90)
99.	Baltimore, MD	UA Entertainment	78,164	(3/90)
100.	Omaha, NE	Cox Cable	78,120	(3/90)

The CABLE POLL DATABASE

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Rate controls would dent, not cripple, cable profits; 45% predict reregulation

By Kathy Haley

Half the cable industry believes a return to rate regulation would hurt profitability, but not substantially. And 84 percent of operators surveyed by The Cable Poll™ also believe rate controls would figure into any reregulation of their industry likely to be enacted in the near future.

According to The Cable Poll™, nearly half of the cable industry (45 percent) expects Congress to reregulate its business by the end of this year. Slightly fewer (41 percent) predict reregulation won't occur in 1990. As it turns out, the latter group will probably prove to be right. More pressing issues facing the House and Senate have postponed the Congressional timetable for reregulating cable, so that legislation is now more likely to occur sometime next year.

Number

5

in a series of eight

Only 13 percent of the 396 system managers surveyed by Cable Poll™ predict that cable reregulation will not include rate controls. This opinion held true, generally, at small, medium and large systems: 18 percent of operators at systems serving fewer than 10,000 subs believe rate controls will not return; 7 percent of those at systems with between 10,000 and 50,000 subs agree and 13 percent of those at systems serving more than 50,000 subs also concur.

Operators are less in agreement on the issue of whether rate controls should be handled at the local, state or federal level. Forty-nine percent of the respondents want rate regulation put in the hands of federal lawmakers. Nearly one-third (29 percent) desire rates controlled at the local level and 18 percent say they would prefer state regulation. Generally, smaller operators are more open to the idea of local regulation, while larger operators vastly prefer national controls.

While 41 percent of operators at systems with fewer than 10,000 subs say they'd prefer national rate regulation (if they have to be regulated at all), 37 percent of the same group would opt for local control. Twenty percent of the smaller operators would prefer state regulation. At systems serving between 10,000 and 50,000 subs, 60 percent of respondents want rates controlled federally; 23 percent want local control and 15 percent want state control.

Operators serving more than 50,000 subs overwhelmingly prefer federal rate control, with 75 percent of respondents choosing that option and none choosing local control. Seventeen percent of the larger operators prefer state control.

Medium-sized operators appear to fear the impact rate controls would have on their bottom lines slightly more than do small or large operators. Sixty percent of medium-sized ops say controls would hurt profitability, but not a lot, while 44 percent of small operators and 56 percent of large operators agree. Fifteen percent of the medium-sized operators feel rate controls would have a "major negative impact on profits." Concurring with them are 12 percent of smaller operators and 13 percent of the largest operators.

More than one-third (36 percent) of small operators maintain rate controls would "not hurt" their systems' profits. Twenty percent of medium-sized operators and 22 percent of large operators agree.

Does you believe that new regulations will include rate control?

	Total	Less 10K	10K -50K	Over 50K
Total	178	95	59	15
Yes	84%	80%	90%	80%
No	13%	18%	7%	13%
Don't Know	3%	2%	3%	7%

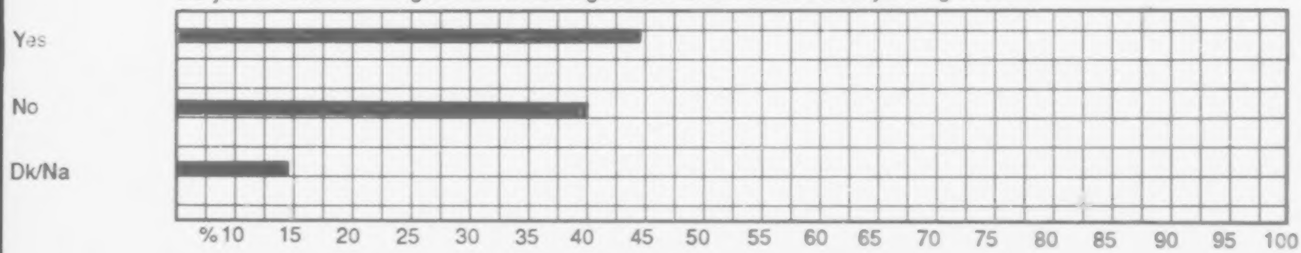
If Congress does enact regulations with rate controls, which of the following do you believe will apply to your system?

	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
Yes	14%	12%	15%	13%
No	50%	44%	60%	56%
Don't Know	20%	36%	20%	22%

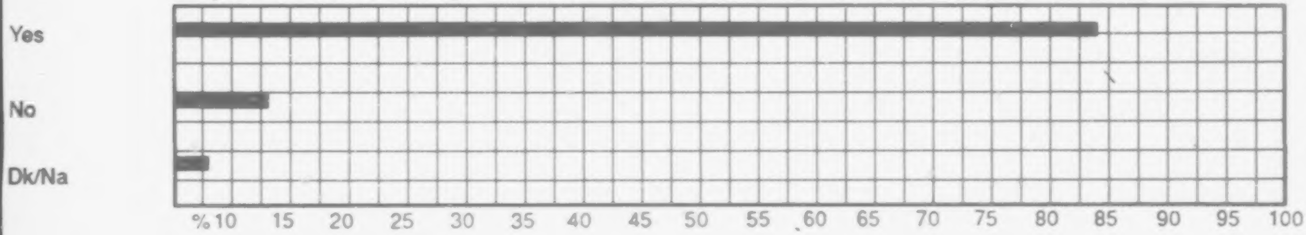
HOW THE POLL WAS CONDUCTED: The Cable Poll™ is conducted for Midwest CATV and *CableVision* magazine by Ryan/Samples Research Inc. Telephone interviews for this edition of the poll were conducted Feb. 1-15 with a random sample of 396 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points.

Adding up your answers:

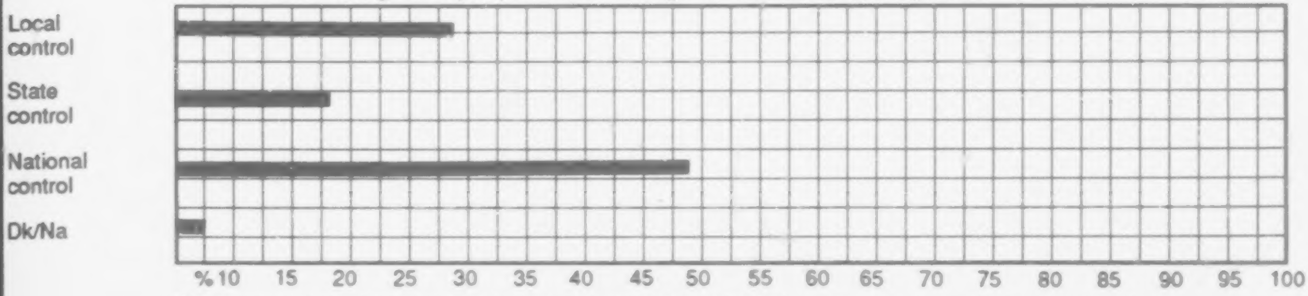
Do you believe that Congress will enact regulations for the cable industry during 1990?



Do you believe that those regulations will include rate control?



Which of the following would you prefer for assuring rate controls are in compliance?



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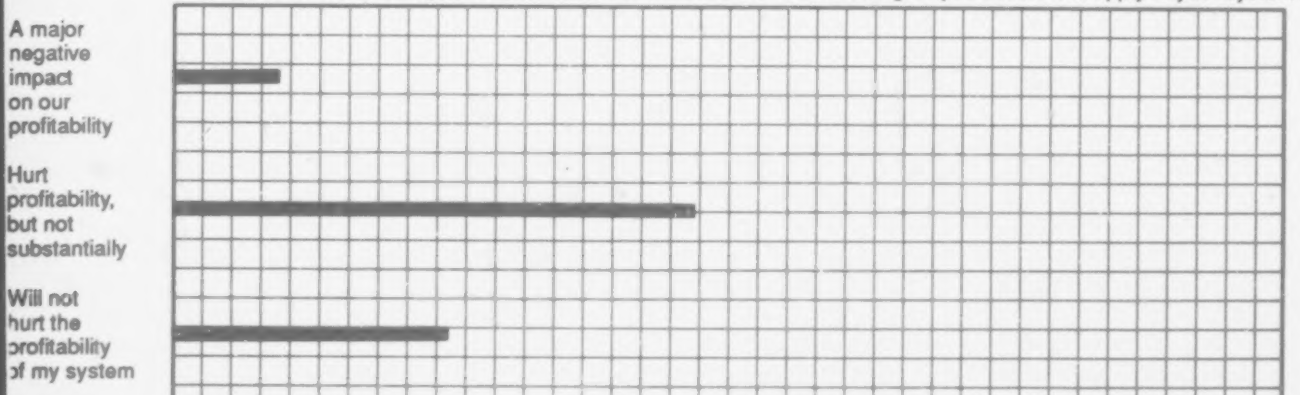

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INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

JUNE 4, 1990

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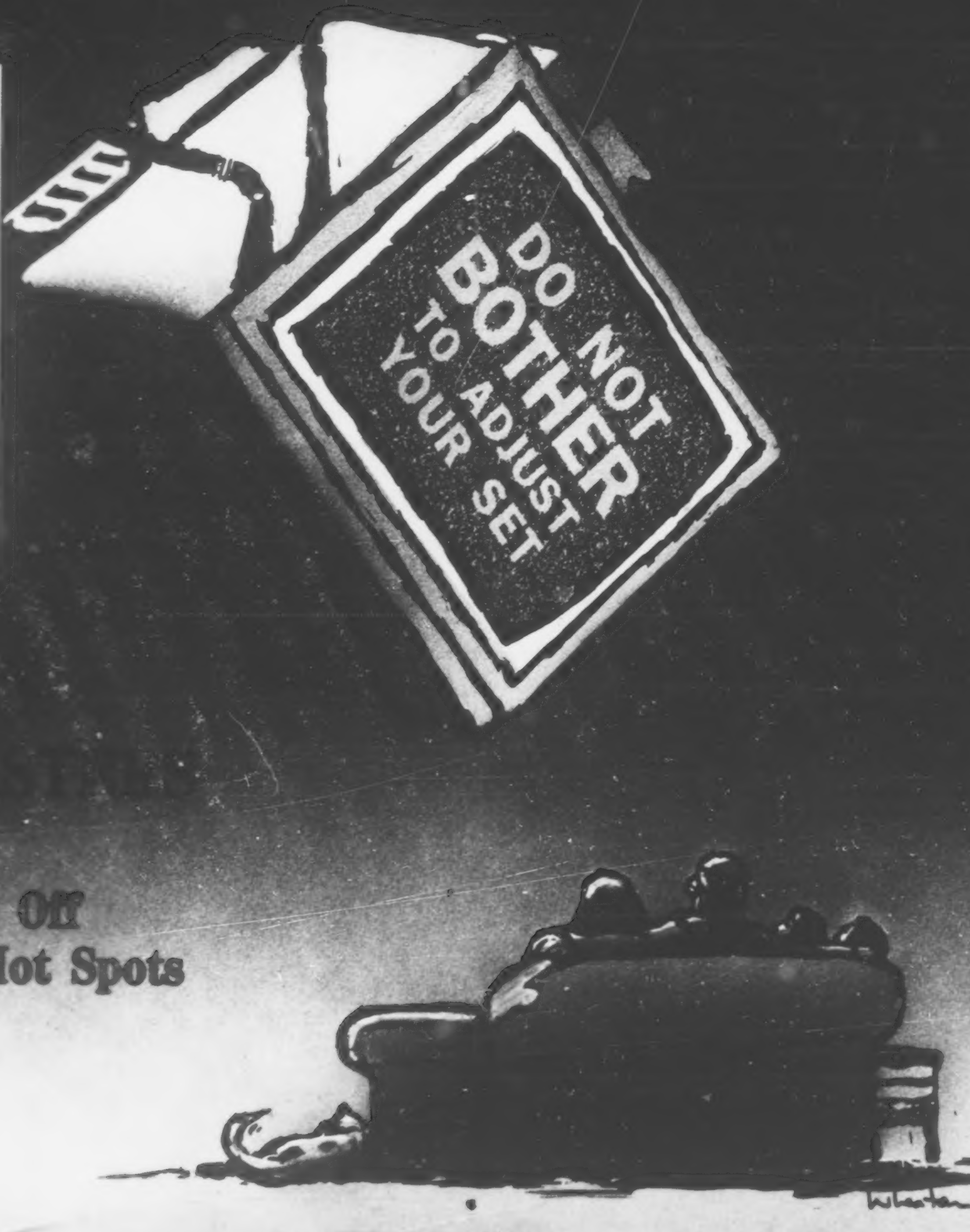
DO NOT
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TO ADJUST
YOUR SET

Cooling Off Local Hot Spots

CableVision

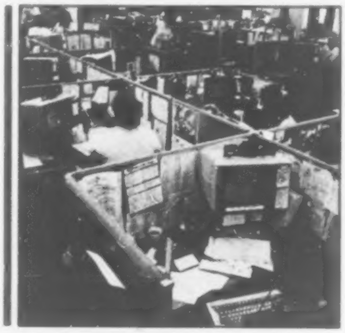
INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT JUNE 4, 1990

FEATURES

PROGRAMMING 32
Tiering dominated the NCTA convention talk, leaving ops, programmers divided

TECHNOLOGY 36
The challenge of '90s: making change transparent to the customer

POLICY 40
A reregulation bill passed by the end of the congressional term is far from certain



Sacramento Cable's CSRs

OPERATIONS 52
MIS/billing vendors making customers service easier

MANAGEMENT 57
The cable industry has been very, very good to the legal profession

MONEY 63
A surprisingly upbeat mood creeps into cable's financial community

COVER STORY

DO NOT BOTHER TO ADJUST YOUR SET

ILLUSTRATION BY WHEATON/TAIT

Climbing Out of PR Hell 22

Five once-notorious systems share their uphill struggle in trying to mend a broken image. It's no walk in the park, believe us.

HANDBOOK

When the ad salespeople make more than the GM 45
MSOs grapple with how to attract the best staff and compensate them accordingly

Amnesty campaign nets 1,200 new subs, 1,330 pays . . 46
Illegal hookups respond to ATC's 99-cent offer in Savannah, Ga.

Retirement plans offer tax advantages, security . . . 48
Cable companies should consider 401k plans for their employees

DEPARTMENTS

BETWEEN THE LINES . . 8
New York City issues a preliminary denial to renewing Time Warner's two Manhattan franchises; Start-up programming services gain momentum at NCTA convention; CNBC offers ops $3 per head; PBS planning cable net; Syndicators find LO market; Fuchs reports all is well at HBO; convention notebook....

CABLE POLL 72
Enhanced customer service makes headway in some areas of system operation, but not others

CALENDAR 78
BPME's annual conference is this issue's highlight event

PARTING WORDS 82
WIC breakfast puts the really big picture into perspective

SPECIAL NOTICE

***CableVision*'s New York staff is now based at 825 7th Ave., New York, NY 10019. The new phone number is (212) 887-8400; call (212) 887-8585 to fax notices.**

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Enhanced customer service makes headway in some areas of system operation, but not in others

Improving customer service is a critical priority for cable operators. Local systems' commitment to that priority shows up clearly in some of their operations, but less so in others.

A quarter of systems, for example, according to our February survey of 396 system managers, haven't stopped charging converter rental fees to subscribers with cable ready sets. Another 29 percent either still charge for VCR hookups or haven't begun offering a VCR hookup guide book to their customers. Perhaps most interestingly, larger systems appear to be adopting some of these subscriber-friendly practices more slowly than are small and medium-sized ones.

The poll also found that 43 percent of local operators have replaced signal scrambling with traps, while 51 percent have not. Medium-sized systems, serving between 10,000 and 50,000 subscribers, have embraced this technology more quickly than small (fewer than 10,000 subs) and large systems (more than 50,000 subs). Forty-six percent of medium-sized systems have replaced scrambling with traps, while 42 percent of small ones and 38 percent of the largest ones have.

Number

6

in a series of eight

Second-set connection charges have been eliminated by only 17 percent of local systems. They are still in effect at 82 percent of systems. Among large systems, only 6 percent have eliminated second-set connection charges, while 17 percent of small systems and 14 percent of medium-sized systems have done so.

While three-quarters of small systems have stopped charging converter rental fees for people with cable ready sets, only 59 percent of large systems have done so. Sixty-eight percent of medium-sized systems have eliminated those fees.

A similar pattern holds true with VCR hookups. Seventy percent of small systems have stopped charging for VCR hookups or begun offering a VCR hookup guide. Only 53 percent of large systems and 65 percent of medium-sized systems have done so.

Large systems are ahead of the pack in introducing lifeline services, with 22 percent having done so at the time of our poll. Among medium-sized systems, 18 percent have added a lifeline tier, while 12 percent of small systems have. In total, 15 percent have added lifeline services while 81 percent have not.

Larger operators are more familiar with off-premise technology than are small and medium-sized systems. Among larger systems, 22 percent report they are "very familiar" with the new technology, while 12 percent of medium-sized and 10 percent of small systems are very familiar.

But while many operators still don't understand off-premise technology, nearly 80 percent are at least "somewhat interested" in implementing it at their systems. Among large systems, 36 percent say they are "very interested" in switching to off-premise technology. Another 41 percent say they are "somewhat interested" in doing so.

Systems uninterested in off-premise technology cite expense as their main objection, with 60 percent of small systems saying it is too expensive. Agreeing with them are 47 percent of mid-sized systems and 20 percent of large systems. ■

Has your system eliminated the charge for a second set connection?

	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
Yes	66	34	19	2
No	326	167	117	29
Don't Know	4	2	1	1

Has your system introduced lifeline services?

	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
Yes	60	25	24	7
No	319	171	107	23
Don't Know	17	7	6	2

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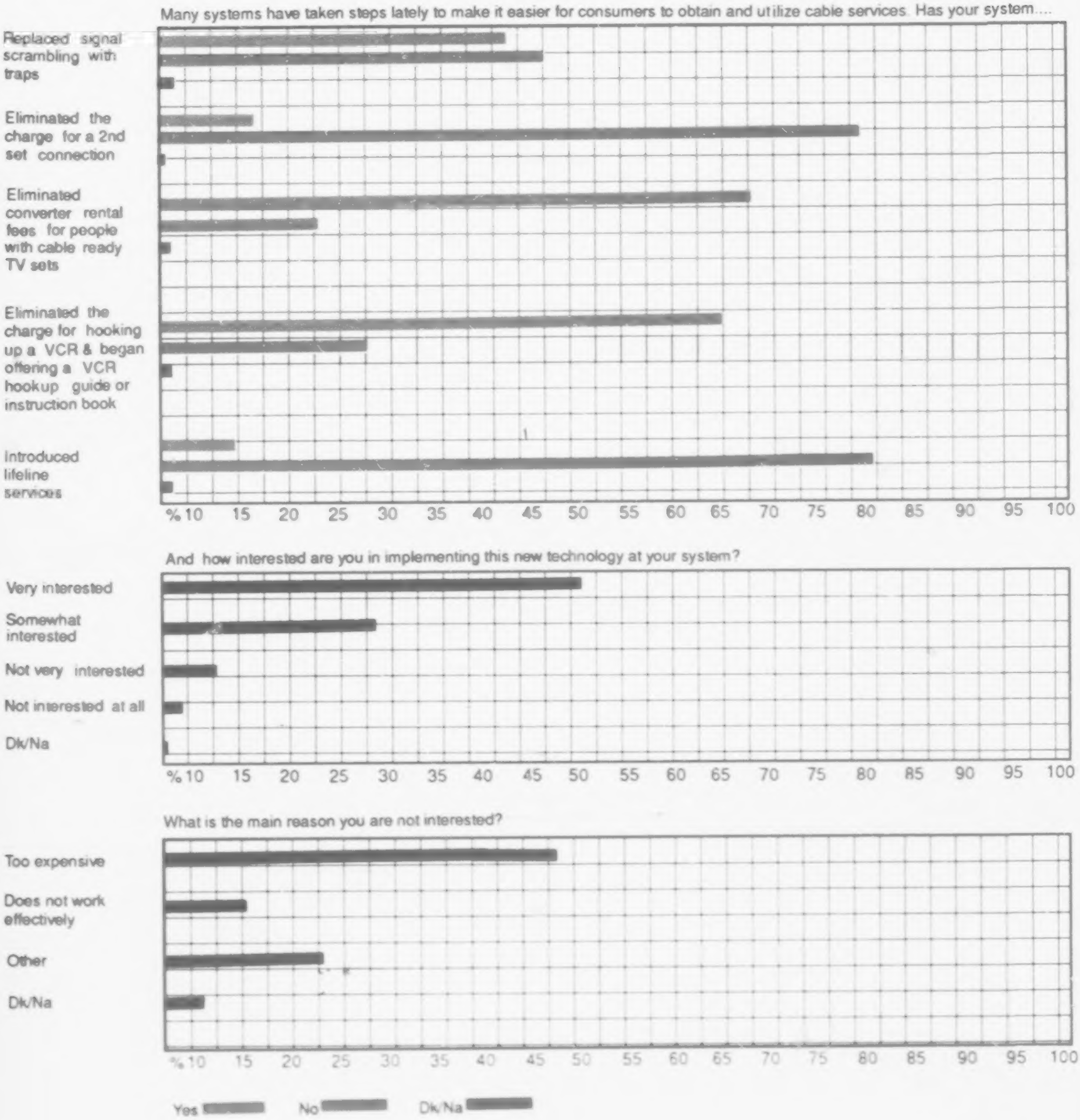


DATABASE

Subscriber Count

Satellite national services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	450	9,200,000
Alternate View Network	300	4,500,000
American Movie Classics	2,100	26,000,000
Arts & Entertainment Network (A&E)	5,800	46,500,000
Black Entertainment Television	2,150	26,000,000
Bravo	400	4,000,000
CNBC	950	14,800,000
Cable News Network	12,590	55,097,000
Channel America	3	67,529
C-SPAN	3,800	49,700,000
C-SPAN II	750	20,700,000
The Comedy Channel	500	6,000,000
Country Music Television	1,878	10,544,117
The Discovery Channel	7,535	50,367,000
E! Entertainment TV	500	14,000,000
ESPN	21,500*	56,084,000
Eternal Word Television Network	650	14,100,000
The Family Channel	8,774	49,598,000
Family Guide Network	60	5,000,000
FamilyNet	356	4,031,155
Financial News Network	3,550	33,000,000
FNN Sports	2,000	23,000,000
Galavision/Eco	310	2,500,000
HA! TV	229	5,000,000
Headline News	4,671	41,000,000
Home Shopping Network	1,500	17,000,000
Home Shopping Network II	400	7,000,000
The Inspirational Network	814	6,800,000
International Television Network	25	7,868,900
J.C. Penney TV Shopping Channel	900	13,000,000
KTVT	481	3,600,000
The Learning Channel	1,228	19,200,000
Lifetime	4,700	49,094,000
Mind Extension University	188	8,000,000
Mizlou Sports News Network	N.A.	5,000,000
MTV	6,220	51,545,000
The Nashville Network	9,376	50,328,000
National College Television	500	5,600,000
Nick At Nite	3,725	46,500,000
Nickelodeon	7,100	51,529,000
The Nostalgia Channel	430	8,540,000
Prevue Guide	610	15,243,208
Prime Network (new)**	1	85,000
QVC Network	3,000	35,000,000
RFD TV	30	2,182,190
Silent Network	209	14,600,000
SportsChannel America	35	2,320,000
TBS Superstation	13,351	54,556,000
Telemundo***	8	110,000
TNT	5,068	43,700,000
The Travel Channel	570	15,000,000
Trinity Broadcasting Network	903	12,800,000
Univision***	533	509,500
USA Network	10,100	52,824,000
VH-1	3,505	35,300,000
Vision Interfaith Satellite Network	417	7,500,000
The Weather Channel	4,000	44,274,000
WGN-TV	12,248	31,000,000
WPIX-TV	723	10,000,000
WSBK-TV	150	2,000,000
WWOR-TV	3,013	13,013,000

Pay services

Cinemax	5,200	6,400,000
The Disney Channel	6,100	5,003,000
Home Box Office	8,500	17,300,000
The Movie Channel	3,250	3,000,000
Showtime	6,000	7,300,000

Audio services

AEI Lifestyle	142	2,578,838
AEI StarTracks Vocal Hits	26	854,390
C-SPAN Audio Network	8	548,100
C-SPAN Audio Network II	4	440,700
Cable Radio Network	65	2,311,692
Galatic Radio	165	4,500,000
KKJZ Super Jazz	20	249,804
Moody Bible Institute	63	1,058,368
Satellite Radio Network	237	483,000
Tempo Sound	125	1,250,000
WFMT Chicago	170	1,453,861

Text services

AP News Cable	185	2,500,000
AP Business Plus	54	1,400,000
AP News Plus	75	2,100,000
Cable SportsTracker	40	1,175,870
EPG	127	4,513,707
EPG Jr.	376	420,381
Reuters NewsView	127	2,437,000
Story Vision Network****	40	2,100,000

Computer services

DBC/MarketWatch	462	N.A.
Electric Toy Box	600	N.A.
X*Press Executive	545	30,000
X*Press X*Change	545	N.A.

Cross-channel promotion services

NuStar	351	10,097,742
Prime Time Tonight	400	7,200,000

Non satellite-fed national services

Basic services	Affiliates	Subscribers
Consumer Classified Ad Network	3	195,000
Fuji Network	3	12,000
Vector Consumer Shopping Guide	9	325,000

Pay services

Nippon Golden Network	5	13,600

Interactive services

Basic services	Affiliates	Subscribers
Video Jukebox Network	55	5,000,000

Regional services

Basic services	Affiliates	Subscribers
Arizona Sports Programming Network	N.A.	308,000
Atlanta Interfaith	3	225,000
Bay Area Religious Channel	6	113,000
Cable TV Network of New Jersey	34	1,500,000
The Ecumenical Channel	9	170,000
Florida Tourism Channel	20	754,000
KBL Entertainment Network	67	1,200,000
Life Newsvision	35	50,000
Madison Square Garden Network	172	3,600,000
Meadows Racing Network	17	700,000
News 12 Long Island	4	601,000
Midwest Sports Channel	90	275,000
Niagara Frontier Sports Network	13	800,000
Northwest Cable Sports Network	3	700,000
Pacific Sports Network	N.A.	1,000,000
Pennarama	28	750,000
Prime Sports Network	108	675,000
Prime Sports Network (Midwest/new)	N.A.	N.A.
Prime Sports Network (Northwest)	65	1,300,000
Prime Sports Network (Rocky Mountain/new)	N.A.	7,000,000
Prime Sports Network (Upper Midwest/new)	N.A.	N.A.
Prime Sports Network (Utah)	26	290,000
Prime Ticket	163	3,800,000
SportsChannel (Bay Area/new)	N.A.	N.A.
SportsChannel (Chicago)	70	1,600,000
SportsChannel (Cincinnati/new)	2	70,000,000
SportsChannel (Ohio)	11	610,000
SportsChannel (Philadelphia)	37	850,000
Sunshine Network	200	2,800,000

Pay services

Home Sports Entertainment	475	2,200,000
Home Team Sports	180	1,500,000
New England Sports Network	171	320,000
Prism	87	470,000
Pro-Am Sports	212	625,000
SportsChannel (Florida)	54	950,000
SportsChannel (Los Angeles)	76	125,000
SportsChannel (New England)	164	1,200,000
SportsChannel (New York)	115	1,300,000

Note: Figures for affiliate/subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision, Cable Stats, 825 7th Avenue, New York, NY 10019.

N.A. denotes information not available. *Includes MMDS and SMATV systems. **Count represents standalone affiliates/subscribers, portions are carried on various regional sports networks. ***Spanish-speaking households. **** Formerly Genesis Storytime

DATABASE

Cable Network Ad Performance

March 1990 billings	March 1989 billings	Year-to-year dollar change	Year-to-year percent change
$98,482,367	$86,465,809	$12,016,558	12.2%

1st Quarter 1990 billings	1st Quarter 1989 billings	Year-to-year dollar change	Year-to-year percent change
$255,538,338	$216,116,628	$39,421,710	15.4%

Top 10 cable net sponsors/March 1990

1.	Time Warner	$4,669,607	6.	General Mills	$2,079,296
2.	Proctor & Gamble	4,428,875	7.	Sears	1,723,357
3.	Philip Morris	3,313,789	8.	General Motors	1,601,801
4.	Anheuser-Busch	2,268,214	9.	Pepsico	1,532,139
5.	RJR Nabisco	2,096,634	10.	Mars Inc.	1,453,040

Top 10 cable net sponsors/1st Quarter 1990

1.	Time Warner	$14,732,344	6.	RJR Nabisco	$6,527,846
2.	Proctor & Gamble	11,812,323	7.	Anheuser-Busch	6,035,300
3.	General Mills	7,349,360	8.	Sears	4,087,680
4.	General Motors	6,989,542	9.	Mars Inc.	3,350,155
5.	Philip Morris	6,736,417	10.	AT & T	2,922,420

Source: Broadcast Advertising Reports data; figures represent combined billings of CNN, ESPN, Family Channel, MTV, USA and TBS Superstation

	1st Quarter 1990 billings	1st Quarter 1989 billings	Year-to-year dollar change	Year-to-year percent change
CNN	$34,011,105	$30,495,779	$ 3,515,326	10.3%
ESPN	63,580,798	42,426,808	21,153,890	33.2%
FAMILY	26,022,370	22,699,833	3,322,537	12.7%
MTV	25,217,741	25,320,101	- 102,360	- .4%
TBS	57,873,406	59,518,384	- 1,644,978	- 2.7%
USA	48,832,918	35,655,623	13,177,295	26.9%

Source: Broadcast Advertising Reports data

Subscriber Universe Estimates

	Total TV households	Cable TV households	Homes passed	Cable percent of TV households
A.C. Nielsen	92,100,000	53,238,990	N.A.	57.8%
Arbitron	91,770,000	51,812,000	N.A.	56.5%
Paul Kagan Associates	90,800,000	49,800,000	N.A.	54.8%

Subscriber numbers as of 3/90
Nielsen figures include Alaska & Hawaii

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

JUNE 18, 1990

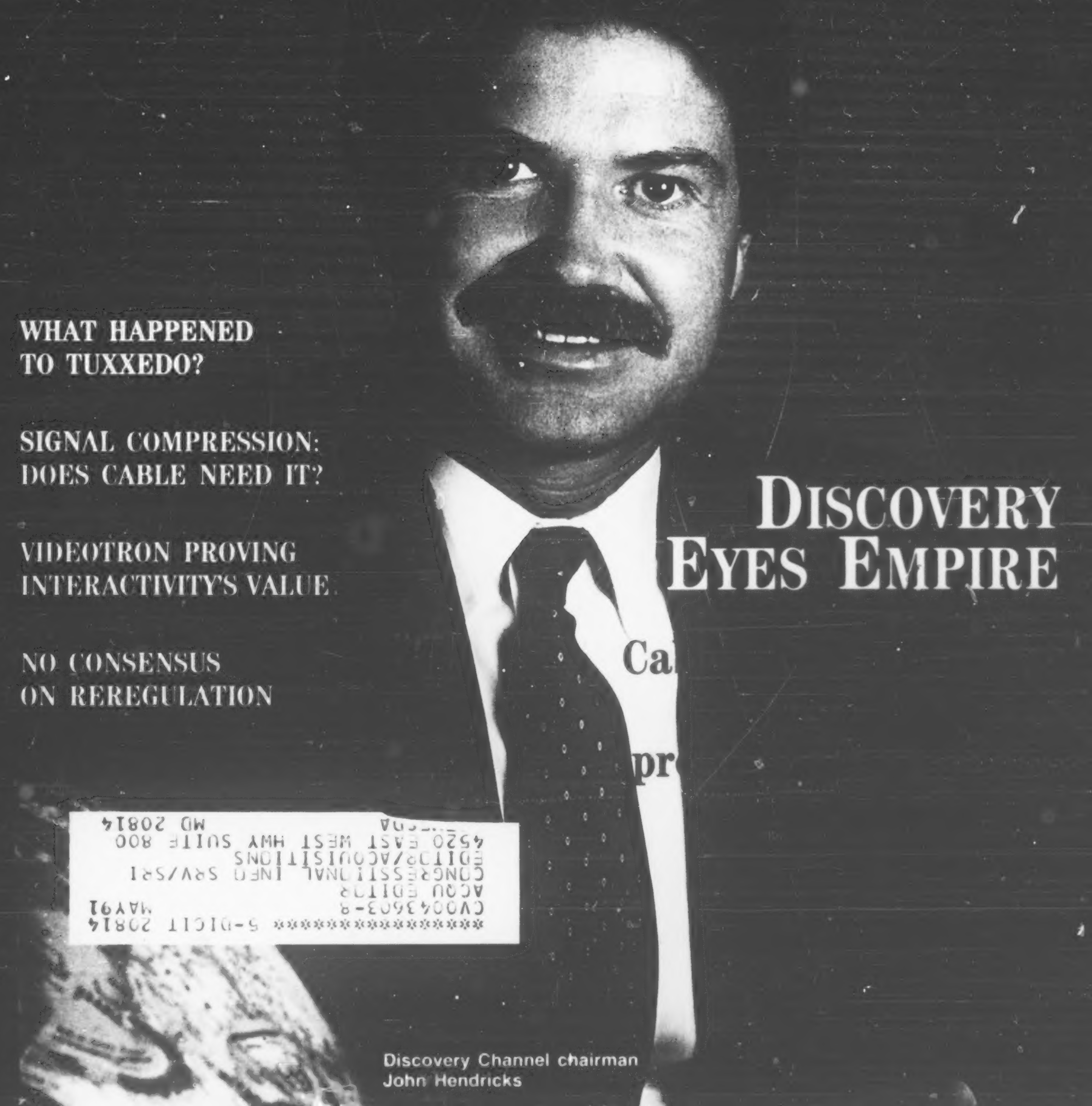
WHAT HAPPENED
TO TUXXEDO?

SIGNAL COMPRESSION:
DOES CABLE NEED IT?

VIDEOTRON PROVING
INTERACTIVITY'S VALUE

NO CONSENSUS
ON REREGULATION

DISCOVERY EYES EMPIRE



Discovery Channel chairman
John Hendricks

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CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT JUNE 18, 1990

FEATURES

MANAGEMENT 32
What Happened to Tuxxedo?
The demise of the R-rated PPV adult service is a legal tempest-in-the-teapot for the cable industry

Let the courts decide what's obscene or indecent (See p. 6)

Artwork by Tom O'Brien

TECHNOLOGY 42
Putting the Squeeze On
Three engineers discuss video compression. Also, the industry's move towards expanding its broadband highway

POLICY 64
No Consensus in Sight
The House and Senate are way apart on basic issues in their reregulation bills

MONEY 68
Realizing New Revenue
Canada's Videotron is showing that interactive services can be successful

COVER STORY

Photo by Katherine Lambert

Discovery Eyes Empire 20
Cable's fastest-growing network broadens programming horizons with an international plan

HANDBOOK

Entertaining kids 58
More and more cable systems are producing local origination programs for children

Kidvid expert advice 60
CNBC's Karen Cooper's credo for reaching kids is to be natural and innovative

Operators be prepared 62
States are trying to pass cable taxes; here's how to fight it

DEPARTMENTS

BETWEEN THE LINES ... 8
Madonna, the material girl, takes the money and runs to HBO; TCI finally making PPV move; Low baseball ratings forcing ESPN to come up with makegoods; Time Warner/New York City still at impasse, but some progress made; Cablevision Systems mysteriously pulls out of Newark system deal; Family Channel decides to pass on acquiring The Cowboy Channel

ESPN baseball by the numbers

CALENDAR 76
The Society of Cable Television Engineers meet in Nashville

CABLE POLL 82
The return of syndex isn't causing that many headaches for operators

PARTING WORDS 86
Contrasting NCTA convention sessions peak into the future

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ABP BPA

The CABLE POLL DATABASE

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Operators avoid marketing, financial headaches associated with re-imposition of syndex rules

By Chuck Moozakis

The Jan. 1 re-imposition of syndicated exclusivity rules hasn't appeared to have landed the knockout punch once feared—either operationally or financially. According to our February survey of 396 general managers, only 13 percent said they had to drop signals to remain in compliance with blackout rules. More important, 62 percent said they didn't spend a single penny to meet the standards.

The February results are slightly below those posted by a similar survey conducted in August 1989, four months before implementation of the rules. In that poll, 16 percent of those responding said they anticipated having to drop at least one station; 9 percent said they had already dropped at least one signal that would have been subject to blackout restrictions.

Number

7

in a series of eight

Moreover, the February survey found that the majority—58 percent—dropped only one signal; 23 percent of systems dropped two; 6 percent three and 8 percent eliminated four or more stations. Of the signals removed, 38 percent were regional superstations; 50 percent, regional independents and 37 percent, network affiliates.

Whether or not a signal was dropped reflected a system's subscriber size, according to the poll. Of systems with more than 50,000 subscribers, 38 percent dropped at least one signal; in comparison, only 7 percent of systems with fewer than 10,000 subs found it necessary to cut carriage.

Likewise, larger systems on average found it necessary to cut more than one signal; with 13 percent responding that they cut four or more stations from their lineup.

Even as operators reacted to syndex, most reported that their relationship with area broadcasters had not suffered, with 88 percent characterizing their association as good or excellent. Almost a quarter reported that their dealings with local broadcasters had actually improved over the months syndex was put into effect; 66 percent termed their relationship unchanged and only 6 percent said professional interactions had worsened.

The amount of money spent by general managers to meet the new syndex standards apparently put only a small dent in MSO pocketbooks. While 62 percent spent nothing, 22 percent spent less than $25,000 to purchase equipment required to black out signals. Only 2 percent spent more than $25,000 and 1 percent earmarked more than $50,000 for proper hardware.

Here, too, larger systems had to spend more than their smaller counterparts, with 38 percent of those serving more than 50,000 households having to spend up to $25,000; 9 percent spending more than $25,000 and 6 percent kicking in more than $50,000 to purchase syndex equipment.

At the same time, though, operators said they were satisfied with the type of equipment available to help them meet the standards. More than nine out of 10 responding to the survey said they couldn't think of a single syndex-related product they needed that wasn't currently on the market. ■

Adding up your answers:

How much did your system have to spend to comply with syndex regulation?

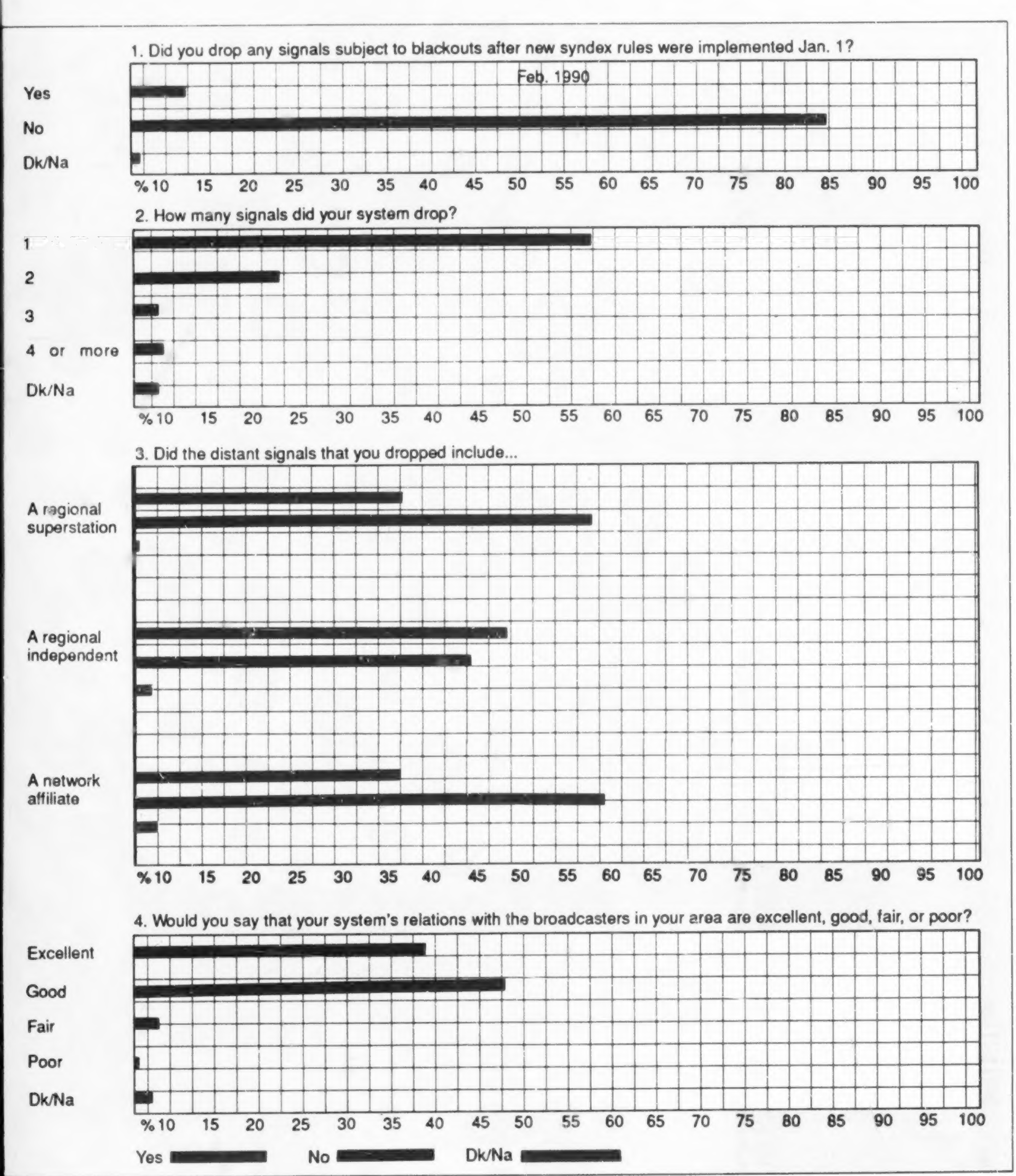
	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
Nothing	245	141	76	12
Up to $25,000	86	30	40	12
Between $25,000 and $50,000	9	3	3	3
Over $50,000	3	0	1	2
Don't know	53	29	17	3

Due to the new syndication exclusivity rules which took effect Jan. 1, did your system drop any signals that were subject to blackouts?

	Total	Less 10K	10K -50K	Over 50K
Total	396	203	137	32
Yes	52	15	23	12
No	338	185	113	19
Don't know	6	3	1	1

HOW THE POLL WAS CONDUCTED: The Cable Poll™ is conducted for Midwest CATV and *CableVision* magazine by Ryan Samples Research Inc. Telephone interviews for this edition of the poll were conducted Feb. 1-15 with a random sample of 396 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points.

DATABASE



1. Did you drop any signals subject to blackouts after new syndex rules were implemented Jan. 1?

2. How many signals did your system drop?

3. Did the distant signals that you dropped include...

4. Would you say that your system's relations with the broadcasters in your area are excellent, good, fair, or poor?

Top 100 MSO's

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	7,014,350	(6/90)
2.	American Television & Communications Corp.	4,300,000	(12/89)
3.	UA Entertainment	2,640,000	(5/90)
4.	Continental Cablevision	2,595,000	(5/90)
5.	Warner Cable Communications	1,751,000	(5/90)
6.	Cox Cable Communications	1,562,548	(5/90)
(8) 7.	Storer Cable Communications	1,550,000	(5/90)
(7) 8.	Comcast	1,535,000	(1/90)
9.	Cablevision Systems	1,492,417	(4/90)
10.	Jones Intercable/Spacelink	1,454,714	(4/90)
11.	Newhouse Broadcasting	1,212,523	(5/90)
12.	Times Mirror Cable TV	1,096,369	(5/90)
13.	Cablevision Industries	1,044,396	(3/90)
14.	Heritage Communications	1,042,345	(3/90)
15.	Viacom Cable	1,018,200	(5/90)
(18) 16.	Adelphia Communications	982,000	(5/90)
(16) 17.	Sammons Communications	886,051	(5/90)
(17) 18.	Century Communications	850,000	(5/90)
(20) 19.	Falcon Cable TV	802,600	(5/90)
(19) 20.	Paragon Communications	790,000	(5/90)
(22) 21.	Telecable	599,357	(5/90)
(23) 22.	Scripps-Howard	560,000	(5/90)
(24) 23.	KBLCOM	530,732	(3/90)
(29) 24.	Maclean Hunter Cable TV	510,000	(5/90)
25.	MultiVision Cable TV	510,000	(5/90)
(27) 26.	Prime Cable	504,767	(5/90)
(26) 27.	Tele-Media	490,571	(5/90)
28.	Lenfest Group	457,886	(3/90)
(32) 29.	TCA Group	437,000	(5/90)
(31) 30.	Cencom Cable	425,000	(5/90)
(30) 31.	Post-Newsweek Cable	417,929	(5/90)
(21) 32.	Cooke Cablevision	352,715	(5/90)
(34) 33.	Colony Communications	337,396	(5/90)
(33) 34.	Multimedia Cablevision	334,000	(5/90)
35.	Simmons Communications	321,777	(5/90)
36.	Rifkin & Associates	312,700	(1/90)
37.	TKR Cable	294,861	(5/90)
38.	Western Communications	293,056	(5/90)
39.	Triax Communications	287,608	(5/90)
40.	Hauser Communications	248,100	(4/90)
41.	Star Cablevision Group	229,954	(5/90)
42.	Service Electric Cable TV Inc.	220,000	(1/90)
43.	Greater Media	211,000	(5/90)
44.	King Videocable	199,200	(5/90)
45.	Insight Communications	192,500	(4/90)
46.	Columbia International	191,000	(3/90)
(48) 47.	Harron Communications	187,000	(4/90)
(49) 48.	Media General	184,983	(5/90)
(52) 49.	Palmer Communications	182,167	(5/90)
50.	C-Tec Cable Systems	180,311	(3/90)
51.	U.S. Cable Corp.	175,000	(5/90)
(47) 52.	Sutton Capital	170,000	(5/90)
53.	Armstrong Utilities	156,732	(5/90)
(55) 54.	Summit Communications	146,080	(5/90)
(new) 55.	Blade Communications	139,000	(4/90)
(54) 56.	Northland Communications	134,870	(5/90)
(56) 57.	Bresnan Communications	133,921	(5/90)
(57) 58.	Booth Communications	129,008	(5/90)
(58) 59.	McDonald Group	125,000	(1/90)
(61) 60.	United Video Management	123,597	(5/90)
(60) 61.	Susquehanna Broadcasting	118,526	(5/90)
62.	Pencor Services	113,314	(5/90)
(67) 63.	Gilbert Media	102,000	(5/90)
(69) 64.	Sonic Communications	101,400	(5/90)
(64) 65.	Midcontinent Cable Systems Co.	99,518	(5/90)
(65) 66.	WEHCO Video	97,681	(5/90)
(66) 67.	First Carolina Communications	96,615	(5/90)
(69) 68.	Barden Cablevision	91,483	(5/90)
(68) 69.	Coaxial Communications	89,600	(5/90)
(59) 70.	Chambers Communications	86,286	(5/90)
71.	James Cable Partners	78,021	(5/90)
(70) 72.	InterMedia Partners	78,000	(3/90)
(72) 73.	Mission Cable	74,223	(1/90)
(76) 74.	Cardinal Comunications	74,152	(5/90)
(73) 75.	Douglas Communications	72,400	(1/90)
(74) 76.	Leonard Communications	66,000	(2/90)
(75) 77.	Fanch Communications	65,000	(1/90)
(77) 78.	Omega Communications	63,000	(5/90)
(78) 79.	Helicon Corp.	60,000	(1/90)
(79) 80.	Telesat Cablevision Inc.	57,235	(6/89)
(80) 81.	Galaxy Cablevision	56,489	(2/90)
(81) 82.	Prestige Cable TV Inc.	55,106	(5/90)
(97) 83.	C4 Media	55,031	(5/90)
(83) 84.	Masada Corp.	53,478	(5/90)
(new) 85.	Verto Cable TV	53,126	(5/90)
(82) 86.	New England Cablevision	52,409	(1/90)
(84) 87.	Star Cable Associates	51,875	(2/90)
(91) 88.	360 Corp.	50,111	(5/90)
(86) 89.	Donrey Media Group	49,416	(5/90)
(85) 90.	Rock Associates	49,300	(5/90)
(87) 91.	Cable America Corp.	48,318	(5/90)
(88) 92.	Republic Communications Corp.	47,000	(1/90)
(89) 93.	Raystay Co.	45,241	(3/90)
(90) 94.	Amzak Cable	45,125	(3/90)
(92) 95.	CableSouth Inc.	43,420	(10/89)
(93) 96.	Cable Holdings Inc.	43,135	(10/89)
(94) 97.	Vista Communications	41,962	(1/90)
(95) 98.	Eastern Connecticut Cable TV	41,820	(6/89)
(96) 99.	National Cable Ltd.	41,300	(4/90)
(98) 100.	Acton Corp.	40,400	(3/89)

( ) Rank last listing

Subscriber counts are provided by MSOs and systems to Cable Vision. Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 825 7th Ave., 7th Floor, New York, NY 10019.

Top 100 Systems

Rank	Location	Operator	Basic subs	
1.	Long Island, NY	Cablevision Systems	527,525	(4/90)
2.	Orlando/Central Complex, FL	ATC	420,000	(1/90)
3.	San Diego, CA	Cox Cable	310,740	(3/90)
4.	Phoenix, AZ	Times Mirror	287,240	(2/90)
5.	Manhattan, NY	ATC	245,000	(5/90)
6.	Puget Sound, WA	Viacom	234,200	(1/90)
7.	San Antonio, TX	KBLCOM	223,789	(3/90)
8.	East Orange, NJ	Maclean Hunter	217,000	(3/90)
9.	Honolulu, HI	ATC	209,000	(1/90)
10.	Brooklyn/Queens, NY	ATC/Warner	200,000	(5/90)
11.	Houston, TX	Warner	183,000	(3/90)
12.	Chicago Suburbs, IL	Continental	181,537	(9/89)
13.	Wayne, NJ	UA Entertainment	180,746	(3/90)
14.	Atlanta, GA	Prime Cable	176,711	(4/90)
15.	Rochester, NY	ATC	174,000	(1/90)
16.	Cherry Hill, NJ	Garden State Cable	172,799	(4/90)
17.	Cincinnati, OH	Warner	171,860	(4/90)
18.	Hampton Roads, VA	Cox Cable	170,206	(3/90)
19.	Louisville/Jeff. Co., KY	Storer Communications	170,000	(8/89)
20.	Chicago, IL	TCI	169,608	(3/90)
21.	Cleveland, OH	Cablevision Systems	169,606	(4/90)
22.	Fairfax, VA	Media General	164,519	(6/89)
23.	Fairfield County, CT	Cablevision Systems	164,054	(4/90)
24.	Hartford/Plainville/Vernon, CT	UA Entertainment	161,075	(3/90)
25.	Montgomery County, MD/ Arlington, VA	Hauser	159,500	(4/90)
26.	Kansas City, MO	ATC	159,000	(1/90)
27.	Jacksonville, FL	Continental Cablevision	154,600	(5/89)
28.	Baltimore County, MD	Comcast	151,000	(4/90)
29.	Manhattan, NY	Paragon	150,885	(4/90)
30.	San Jose/Campbell, CA	Heritage	149,197	(3/90)
31.	Denver (suburbs), CO	UA Entertainment	148,167	(3/90)
32.	Pompano, FL	Continental	147,381	(9/89)
33.	Memphis/W. Memphis, TN	ATC	147,000	(1/90)
34.	Tulsa, OK	UA Entertainment	145,738	(3/90)
35.	Charlotte, NC	ATC	145,000	(1/90)
36.	San Francisco, CA	Viacom	141,600	(1/90)
37.	Buffalo, NY	Adelphia Communications	139,515	(8/89)
38.	San Diego, CA	ATC	135,300	(11/89)
39.	St. Louis, MO	Cencom	135,230	(8/89)
40.	Las Vegas, NV	Prime Cable	132,878	(4/90)
41.	Seattle, WA	TCI	131,315	(3/90)
42.	Austin, TX	ATC	128,000	(1/90)
43.	Chicago Suburbs, IL	Jones	126,000	(2/90)
44.	Warren, NJ	TKR	124,000	(2/90)
45.	Tacoma, WA	Viacom	120,700	(1/90)
46.	Raleigh/Durham, NC	ATC	120,000	(1/90)
47.	Wilmington, DE	Heritage	116,666	(3/90)
48.	San Diego County, CA	Times Mirror	115,884	(2/90)
49.	Southeast Michigan	Comcast	115,000	(4/90)
50.	Pinellas County, FL	Newhouse	114,000	(6/89)
51.	Toledo, OH	Blade Communications	113,500	(4/90)
52.	Grand Rapids, MI	UA Entertainment	113,119	(3/90)
53.	Hillsborough/Tampa, FL	Paragon	112,103	(1/90)
54.	Indianapolis, IN	Comcast	112,000	(4/90)
55.	Orange County, LA	Times Mirror	111,506	(2/90)
56.	Chicago, IL	Group W	110,339	(4/90)
57.	Dallas, TX	TCI	110,000	(3/90)
58.	Jefferson Parish/Kenner, LA	Cox Cable	107,639	(3/90)
59.	Boston/Brookline, MA	Cablevision Systems	108,115	(4/90)
60.	San Juan, PR	Multivision Cable	106,046	(6/89)
61.	Nashville, TN	Viacom	105,400	(1/90)
62.	Richmond, VA	Continental	102,121	(10/89)
63.	Jackson, MS	ATC	101,000	(1/90)
64.	Pittsburgh, PA	TCI	99,187	(3/90)
65.	Worcester, MA	Greater Media	98,102	(4/90)
66.	Columbus, OH	Warner	98,000	(3/90)
67.	Monmouth, NJ	Sutton Capital	97,579	(9/89)
68.	Greensboro, NC	ATC	97,000	(1/90)
69.	Reading, PA	ATC	96,000	(1/90)
70.	St. Petersburg, FL	Paragon	95,412	(2/89)
71.	Naples, FL	Palmer	94,450	(6/89)
72.	Portland, OR	KBLCOM	91,743	(3/90)
73.	Fresno, CA	Continental	91,253	(4/90)
74.	Albuquerque, NM	Jones Intercable	91,205	(12/89)
75.	Dade/Broward County, FL	Storer	90,000	(8/89)
76.	Wichita, KS	Multimedia	88,732	(9/89)
77.	Independence,MO	Jones	88,628	(8/89)
78.	Minneapolis/St. Paul suburbs, MN	Hauser	88,600	(4/90)
79.	Houston Suburbs, TX	Prime Cable	88,388	(4/90)
80.	Fayetteville, NC	ATC	87,000	(1/90)
81.	Milwaukee, WI	Warner	87,000	(3/90)
82.	South Bend, IN	Heritage	87,000	(3/90)
83.	Tucson, AZ	Cooke	86,976	(8/89)
84.	Akron, OH	Warner	86,000	(9/89)
85.	Toms River, NJ	Adelphia	85,826	(2/90)
86.	Baton Rouge, LA	UA Entertainment	85,476	(3/90)
87.	Harrisburg, PA	Sammons	85,200	(8/89)
88.	Orange County, CA	KBLCOM	85,182	(3/90)
89.	Dover/Morristown, NJ	Sammons	84,640	(8/89)
90.	Medford, MA	Warner	83,000	(3/90)
91.	W. San Fernando Valley, CA	CV Industries	82,967	(2/90)
92.	Buffalo, NY	TCI	82,629	(3/90)
93.	New Orleans, LA	Cox Cable	81,721	(3/90)
94.	Oklahoma City, OK	Cox Cable	81,404	(3/90)
95.	Lincoln, RI	Heritage	80,949	(3/90)
96.	Providence/Warwick, RI	Times Mirror	80,523	(2/90)
97.	Harlington, TX	Heritage	79,794	(3/90)
98.	Columbia, SC	CV Industries	78,818	(2/90)
99.	Baltimore, MD	UA Entertainment	78,164	(3/90)
100.	Omaha, NE	Cox Cable	78,120	(3/90)